4

COUNTER SKETCH studio

VERSION 4 USER GUIDE

CHAPTER	TITLE	PAGE
Introduction	Getting Started	2
1	Search	6
2	Customize	14
3	Freehand	24
4	Appearance	32
5	Account Info & Preferences	38
6	Order	46
7	Deliver	52
8	Help & Resources	56

COUNTERSKETCH STUDIO 4 - EMBRACE CREATIVE FREEDOM

Welcome to CounterSketch 4.0. This upgrade is packed full of everything you need to design bridal, remounts, family jewelry, pendants, earrings, and more.

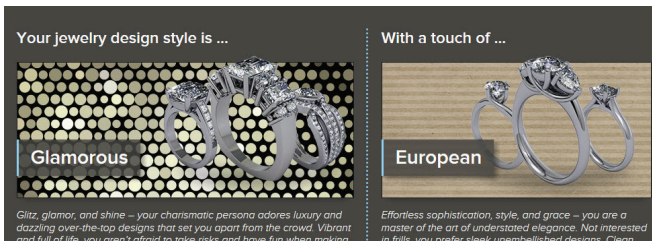
The revolutionary new enhancements within this version will assist you and your customer in locating a design that matches their exact jewelry needs. Whether you use the newly-introduced Style Quiz to break the ice, or you hand over the mouse to your client, providing a pressure-free shopping experience to browse your virtual inventory at their own pace, the new intuitive Search interface leads you down an amazingly user-friendly path, allowing you to easily Compare items. This process of elimination speeds up your time



to find the right model that meets your clients needs.

During the Customize phase, the newly-developed Design Manger organizes your models, allowing you to view Favorites side-by-side. If the model you choose to customize doesn't fit the bill exactly, don't worry, within the new Freehand mode the design limitations have been removed.

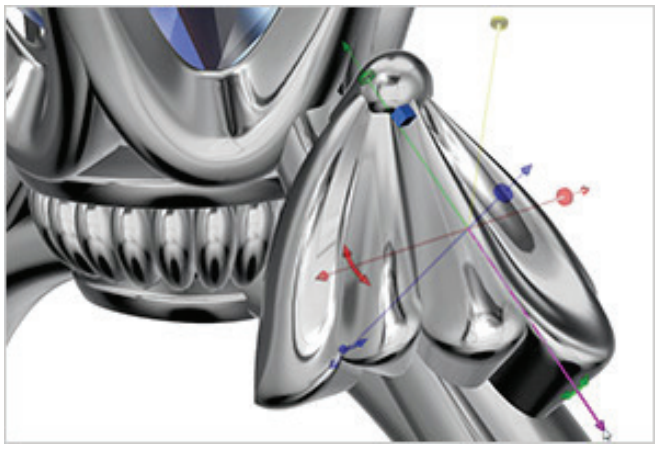
Get inspired and dazzle your customer within the new Freehand Mode. This entirely new way of modeling





gives you more power to delight your customer than ever before. Add gems and Design Elements to an existing CounterSketch model or create a new design from the ground up. This exciting new approach to designing and selling allows you to interact with your design like never before, - using the powerful new Viewport Control Handles.

Viewport Control Handles allow you to Move, Scale Rotate and Bend Design Elements on screen until they are just right! By combining the flexibility of the CounterSketch library, beautiful Design Elements, and flexible CounterParts, you gain creative freedom without sacrificing speed and ease-of-use. And if you don't find the exact part you want to use, simply Import a part you created from Matrix (Gemvision's award-winning CAD software package). Customization doesn't end





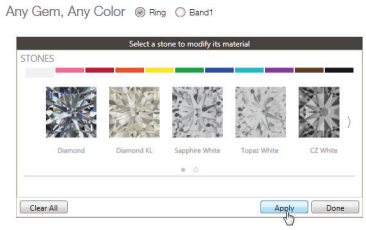


with sliders! Experience the power of CounterSketch Studio Version 4.

After customizing a design to perfection, choose from over 100 new gemstone materials to Render your item. And best of all, create a stunningly-photorealistic render picturing Any Gem in Any Color.

As if that wasn't enough, the Order process has been streamlined. Faster than ever, the materials assigned during the Search and Customize phase of the consultation automatically transfer to the Order process, saving you time so you can focus all of your attention on providing your customer with a fun and innovative way to shop for jewelry.

Gemvision and Stuller's strategic partnership has never been stronger. Fully-aligned as our partner, you can harness the power of Gemvision's technology and the expertise of Stuller's uncompromised customer service and logistical finesse to provide the total solution for jewelry customization within your store.

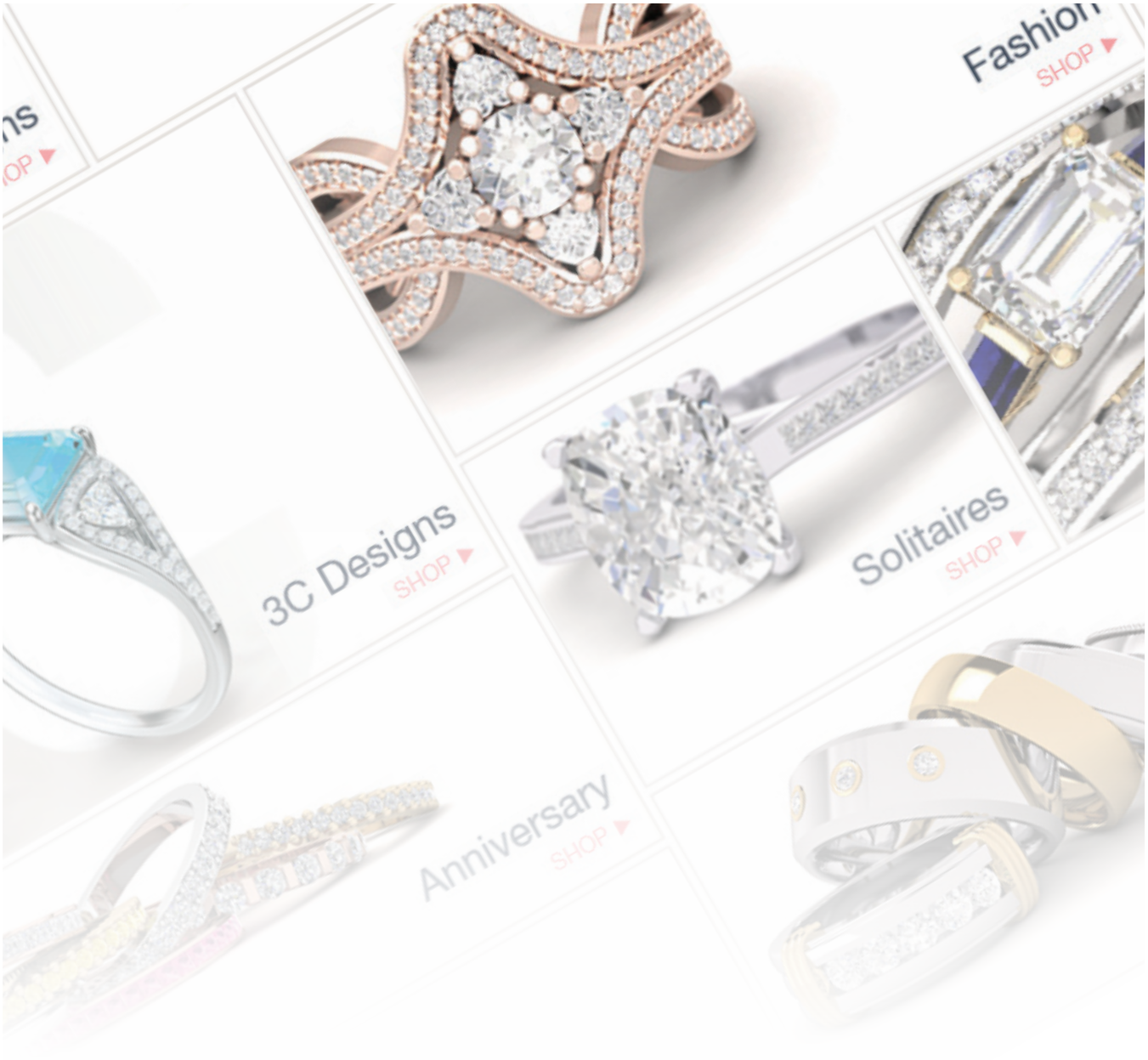




SIMPLIFY CUSTOM DESIGN

Using CounterSketch Studio, even a casual computer user can be a major player in today's new custom-jewelry world.





CHAPTER 1

Search

INTERACTING WITH SEARCH



Upon opening CounterSketch Studio, the graphic display offers you and your customer many inventory categories to choose from.

Qualifying your Customer

Qualify is a term we will use to define the process that takes place when guiding your customer down the most efficient path toward the custom jewelry design of their dreams.

Although CounterSketch Studio may be the most powerful tool in your arsenal for selling custom jewelry, as with any tool, if you do not understand how to use it effectively, it's highly possible you may use CounterSketch all day long and never make a sale. CounterSketch Studio was created to help lead customers to jewelers and provide a new, exciting, and more cost efficient way of creating custom designs. CounterSketch Studio and your customer have one thing in common; they both need YOU! Both require a skilled individual with knowledge about jewelry and selling jewelry in order to help conceptualize and manifest a beautiful design.

It is *extremely* important to qualify the customer first. The first step is to determine whether custom design is even the right option for your client. Can they spare the extra time that the manufacturing of custom requires, and do they find added value in creating something unique to their own lifestyle and aesthetic? If custom is the right choice, CounterSketch will offer an exciting shopping experience.

However, before sitting down in front of CounterSketch, further qualify your customer. The more information you know *prior* to launching Counter

SELLING TIP

Remove any inhibitions your customer may have about being in a jewelry store, and their preconceived notions of a 'high pressure sales' experience by teaching them how to mark a design with a green checkmark, allowing them time to browse the library independently and return to visit with them after a few minutes. Then use the Compare tool to begin the design consultation.

When you ask a customer,"What is your style?", many times they cannot find words to describe their taste. After providing them with the tools and a few minutes to browse, it may become clear they actually have a very clear idea of their design aesthetic - maybe just a more visual idea than a verbal one.

Sketch Studio, the better (and faster!) the experience is for everyone involved. By qualifying, you avoid going down a 'rabbit hole' in search of the perfect item. Chances are your client will start to feel overwhelmed with all of the choices available to them and end up "needing to think about it a bit more", then leaving not to return. The number of models, as well as the multitude of options available for each model within CounterSketch can make one feel that way if you dive in without any sense of the direction or a destination in mind.

It should be mentioned that the best sales people don't try to push a sale. On the contrary, a great salesperson asks lots of questions, extracting valuable information so they can help assist in making an informed decision in regards to the purchase, and in turn, building a strong relationship with the client in the process.

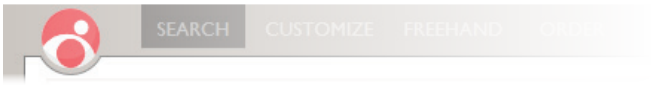
The key to pulling information from a client is asking lots of open-ended questions and truly listening to those answers. What type of jewelry are they shopping for? Is it an anniversary present or an engagement ring? Do they like yellow or white metal? Do they like more modern items or more traditional designs? Take note of the jewelry items they wear and ask what they like or dislike about those items. It's also highly likely that there is a budget to take into consideration. You may choose to use items from your store's showcase or from the CounterSketch Studio Prototype Selling System to assist in qualifying your customer - or you may choose to use the images

within CounterSketch in conjunction with live merchandise to help qualify.

Information about your clients' likes and dislikes is as valuable as gold. If you extract important information about your client, by all means write it down and file it. Find a system that works for you and your work environment. This information not only helps with the current sale, but can also assist with any future sales. The information you can recall about a client's aesthetic a year from now (or five years from now) can go a long way towards building a lasting relationship that will keep them - and in turn, their friends and family - coming back to your store for generations to come.

So let's get started!

PERFORM A SEARCH



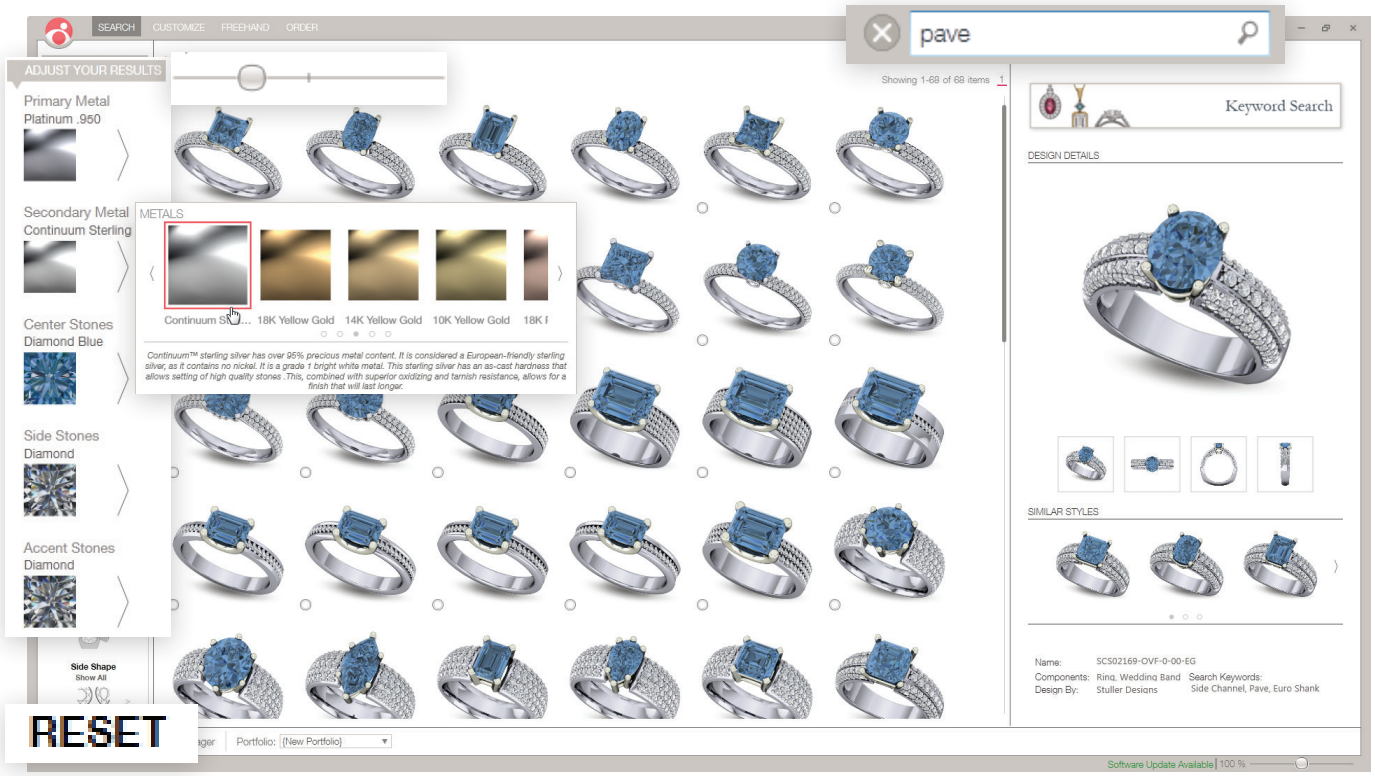
Designed to have the familiar look and feel of a website storefront, **Search** is where you and your customer together (or your customer independently after a quick lesson from you), will begin the customization process. Notice that when hovering the mouse over the categories, a short description of each category is revealed. This gives your customer a bit more information to help them with their decision-making process. Select an option such as Engagement or Solitaires and the program will return the results and images of all related items within the next screen called the **Showcase**.

The resulting number of designs retrieved will appear at the top-right of the Showcase. Use the scroll bar to the right of the Showcase to browse the designs. Many searches will result in more than one page of items. If so, click on the page numbers also along the top-right-hand side. The slider located at the top-left corner of the Showcase adjusts the size of the resulting images.

At any point during the design consultation, return to the starting screen to begin a new search by hitting the Back to Collections button located in the top-left-hand corner.

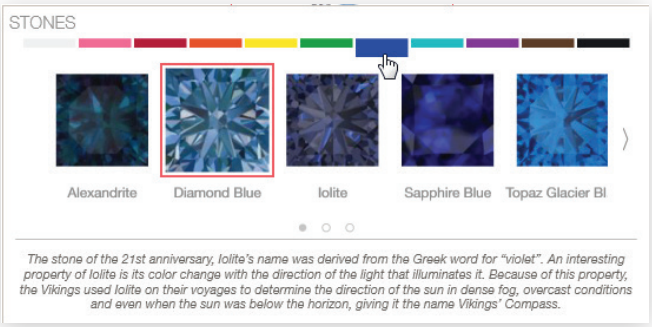
Refine Your Search

Immediately amaze your customer and make the resulting items appear instantly in whatever metal and gemstone color combination they wish to see. Select the desired filters underneath Adjust Your Results along the left side if the interface. Select the Primary and Secondary Metal, Center Stone, Side Stone, Accent Stones. Continue to filter the results beneath the Narrow Your Choices menu. Choose Center Gem Size, Center Shape, Center Setting, Side Shape, Side Set-



ting, Style, and Design Elements, or enter a specified Center Gem Size into the text boxes. The Showcase instantly reflects the updates with the new filters applied including metal and gemstone color. Remove the filters using the Reset button located at the bottom-left of the interface.

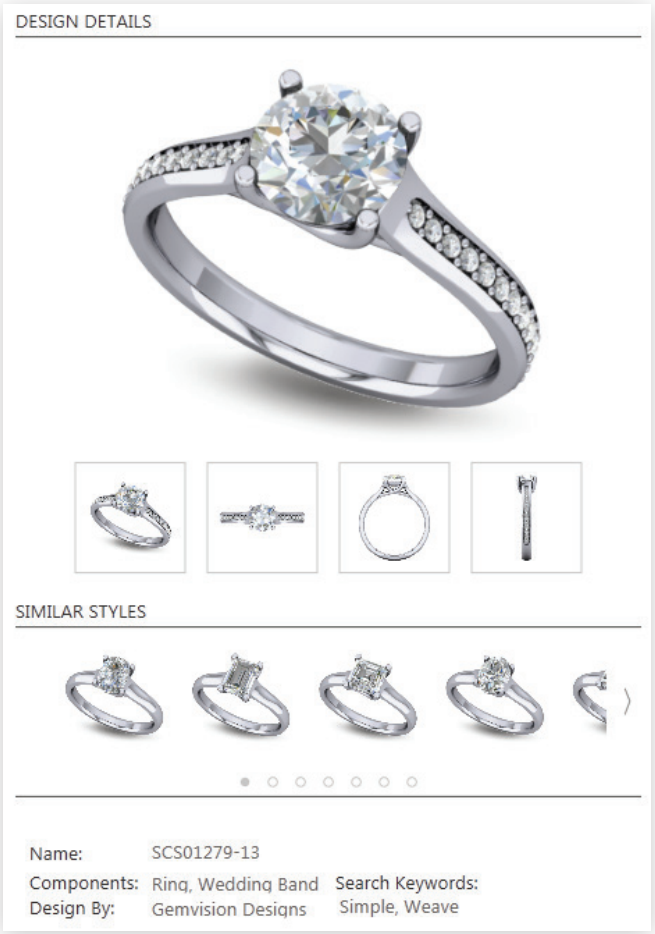
When choosing materials for gemstones, open the menu and select the color range at the top. This exposes the gemstone options within this color range. Next, choose the gem material. Hover your mouse over each tile to see a description of the gemstone options. After selecting a material the menu, it will automatically close and the gemstones will update immediately within the Showcase to reflect this change. Some menus have multiple pages of options. Quickly navigate between pages by selecting the small circles along the bottom of the menu, or navigate page to page with the small arrows on either side of the menu.



If the customer has a very clear idea of what they are looking for from the beginning, you may also use the Keyword Search field located at the top-right-hand corner of the interface to hone down the search to one or more words relevant to your customers dream item. Technically the Keyword Search field recognizes the words in the fields of: Stone Shape, Stone Setting, and Style. Ex: You can type in halo, heart, bezel, teens, channel, its SPI number (sku number associated to the design) if known - even filter results further by typing in "teen heart". You get the idea. Click the 'X' located to the left of the keyword to remove the keyword filter.

RESET

The Reset button located in the bottom-left-hand corner of the interface clears the search filters above. To reset a keyword use the small 'X' in the top-right corner of the interface which appears after entering text into the keyword text box.



Design Details

At this point in time, your customer will probably want to see some of the options up-close and personal to help them with the decision-making process. Click on any library image to select it. When selected, brackets will surround the design and the right side of the screen will update with a larger thumbnail image of the piece. Four smaller thumbnails will display alternate views of the model as well. Click on any of the four images and this view will replace the larger image above.

Similar Styles

Below the design you will also see Similar Styles display (if any exist for that model). Maybe your customer is interested in seeing the design with a different Center Stone shape. Have them scan the style variations to see if an alternate model fits the bill. Clicking on the Similar Style image will make it appear in the four thumbnail views and *its* detailed information will populate below.

Additional details are located beneath the Similar Styles. You will find the models Name, Series (if

available), Components (what the jewelry item is and whether or not there are any complimentary items available. Ex: matching wedding bands), Design By (design creator), Packages (displays the name of the Prototype Package containing the design, if available - See more under Prototypes), and Keywords (the search filter words linked to the design).

USER TIP

Center gem shapes are included in all 3C models. Therefore, 3C models do not have similar styles. All 3C Designs are available at www.stuller.com

SAVING SEARCH RESULTS

During the initial steps of the design consultation, identify designs your customer is "drawn to" by clicking on the small circle (lower-left-corner of the image) associated with the item. This action will place a small green checkmark next to the design. After marking an item, the Compare button becomes available at the bottom of the Showcase. The number of items marked will display (a small number in parenthesis within the Compare button).



USER TIP

If you double-click a design the Showcase, the view will change to the SketchPad and the item will appear full-screen. In the upper-left corner of the interface Customize will become the active mode. Click Search to return to the Showcase.

The marked items can be saved by entering a name into the Portfolio text box. Hover your mouse and double-click on the Portfolio text box, then enter a name into text field. The designs will be saved under this name within the Design Manager. Portfolios and the Design Manager are explained in detail within the Customize chapter.

You have the option of teaching your customer how to browse the Showcase independently and identify designs of interest, marking them with a checkmark as they go. This process creates a jumping off point for the design consultation and allows them a pressure-free way to browse your jewelry.

USER TIP

Create a naming convention and stick to it. Standardizing this means that if a customer needs to come back at a later time, anyone can quickly locate the customer's designs. We recommend using the customer's last name followed by their first name.

Compare and Clear

After identifying the items your client likes, use the Compare button to display only the marked items. (Compare becomes visible only after marking an item with a green checkmark). This filtering process allows you to eliminate designs and is an important step in the design consultation. By removing unnecessary



designs you can see at a glance the "style" of item you client desires.

Use the Design Details area to further discuss and eliminate items, click on an item and the Design Details will appear to the right of the Showcase. Click on any of the 4 views to see that view in a larger format. To continue removing designs toggle the green checkmark 'Off' to remove it from the group. Return to the Showcase to continue viewing the inventory by clicking the Return to Results button located at the bottom of the interface.

If you wish to remain within the current Portfolio but remove the items marked with a green checkmark, use the ***Clear*** button. The Clear button is only visible when items are marked with a green checkmark. This function removes the green checkmark and reverts you back to your initial Search results.

USER TIP

Although there is no limit to the amount of designs that can be marked, we recommend filtering down to 3-5 if possible so as not to overwhelm the customer with the multitude of options available for each design during the Customize phase of the session.

Selling with Prototypes

Stuller's high-quality prototypes are a rhodium-plated alloy set with cubic zirconia. This valuable resource helps your customer visualize and make the translation from a computer monitor to a live piece of jewelry.

Prototypes and jewelry from your stores inventory can be used in conjunction with CounterSketch to qualify your customer. After using the Compare tool and assessing your customers aesthetic, gather live jewelry items from your stores showcases to help them with their design decisions. Pick things that are similar to their choices within CounterSketch.



Prototypes can help determine things like setting styles for side gems, prong layout, gem shape and more. This process will help you to identify which of the CounterSketch models best suits their needs and help to eliminate the designs that don't. Keep in mind, if by using prototypes and live merchandise your client finds the perfect item from within your stores inventory, by all means, close the sale. There are many ways to harness the power of CounterSketch within your store. If, after continuing to identify what is important to your client and they still don't find what they are looking for, but can find something close, continue to the Customize chapter and learn how to personalize a design especially for them.

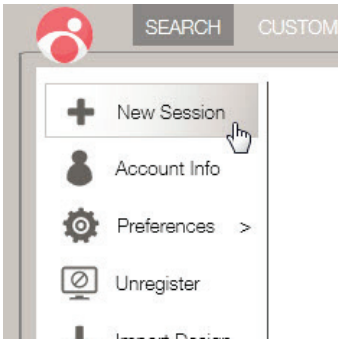
All Kits Include:

- Displays loaded with tagged product
- Access to Stuller Showcase for retail pricing
- Follow-ups from their prototype specialists
- Financing options for eligible clients

Contact Stuller's prototype specialists at 1.800.877.777 ext. 414 for more information.

NOTE: *If you are ordering an item from outside of the United States, please contact Stuller with any questions and/or more information about turnaround times.*

New Session



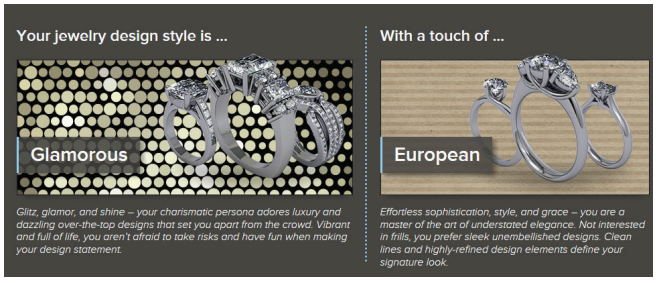
If you would like a clean slate with which to begin a new design consultation, locate New Session under the CounterSketch menu (The CounterSketch icon in the top-left corner of the interface). You will be prompted to save the Portfolio. Answer Yes and give it a name, or choose No to completely reset the program without saving. The CounterSketch interface will reset as if the program had just been opened, clearing any search criteria from the SketchPad and loading a new, empty Portfolio. New Session is useful if you have finished working with a client and want to prepare for your next design consultation.

The Style Quiz

What defines your personal sense of style? Is it hard to put into words? The CounterSketch Style Quiz can help you get started.

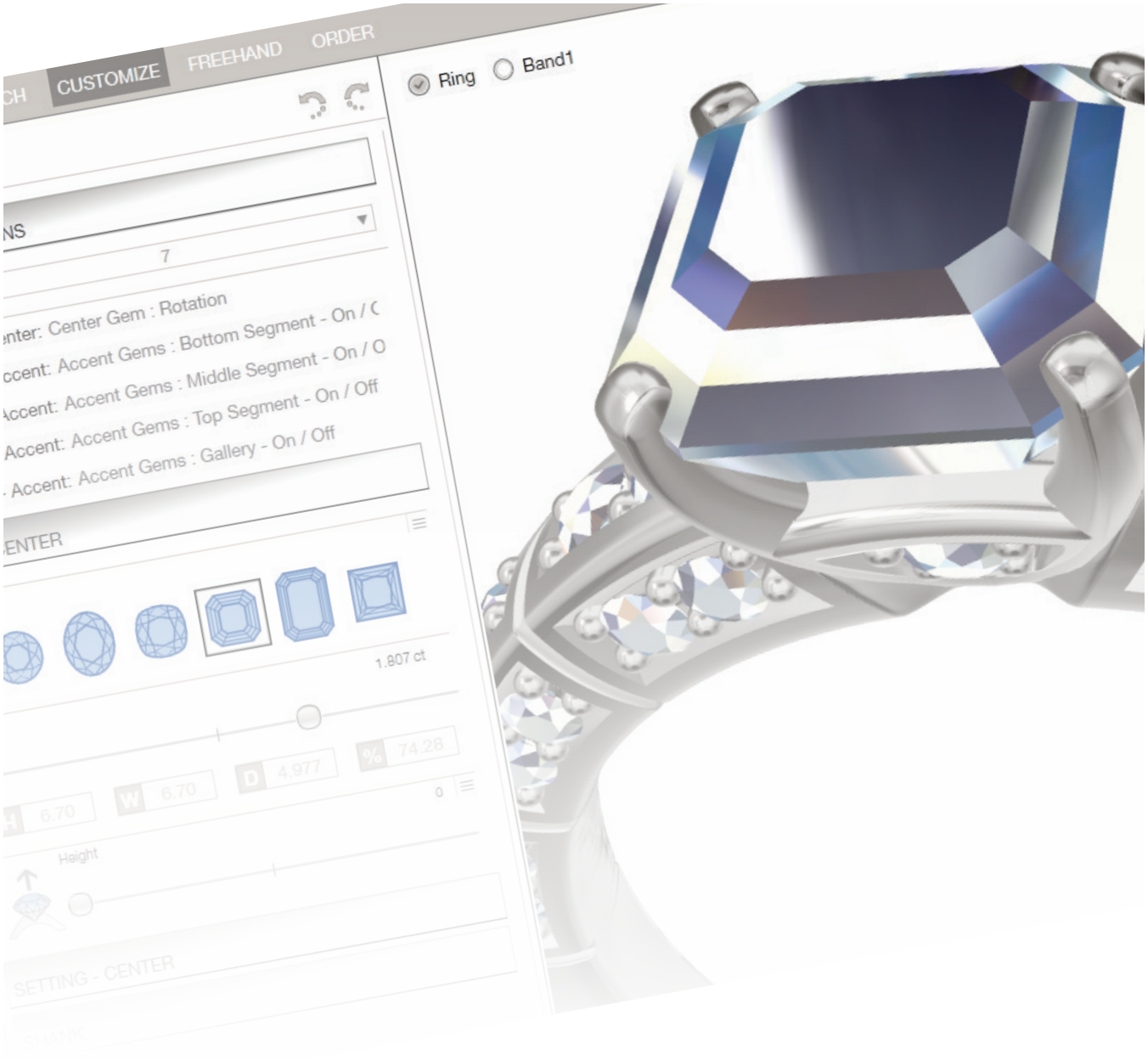
Located along the top-right-hand side of the Counter-Sketch interface while in Search mode, click What's Your Style to prompt a short visual quiz. Begin by asking your customer to read the instructions which simply tell them to choose one image from a group of images and pick the one they are most attracted to. For example, which house would they most like to live in? Which pair of shoes would most likely be found in their closet (or their girlfriend's closet)? The results are most accurate when they go with their gut feeling and don't spend too much time worrying about what the results may say about them, or which image is the 'best'. If your customer is shopping for someone else, instruct them to pick things they think the recipient would like. Click Take the Quiz to begin.

After choosing their selection of images, the quiz will return the results and offer a primary and secondary jewelry design style and recommend items that fit this aesthetic. The style categories are Art Deco, Art Nouveau, Classic, Contemporary, European Chic, Glamorous, Modern and Vintage. These styles are associated with the Style filter located along the left side of the Search interface. To view the jewelry recommended, follow the instructions by choosing Browse these Styles. Choose Retake to start the quiz from the beginning. At any time you can exit the quiz by choosing Close in the top-right corner.



USER TIP

Use the Style Quiz as an ice breaker. Ask your customer whether the results accurately define their personal sense of style and use this information as a fun and interactive way to begin the design consultation.



CHAPTER 2

Customize



CREATING A RETAIL EXPERIENCE

If you were newly-engaged and out to dinner with family and friends, which story would you rather tell? #1: "I went into a jewelry store and chose a ring out of their Showcase", or #2: "I visited my jeweler and I custom-designed a one-of-a-kind ring for my fiancé" If you chose #2, we thought so. You agree with 100% of the people we asked. (Feel free to use this line to help close the sale!).

CREATE A CUSTOM DESIGN

In this chapter of the CounterSketch Studio User Guide, learn the details of how to customize a design to meet the needs of your client. It should be mentioned that CounterSketch Studio was designed to be used in front of your customers. Engaging and exciting them during this crucial phase of the design consultation will go a long way towards closing the sale.

Involving them in the search and customization process gives them a feeling of ownership over the creation of the design. When the customer plays this key role in the creation of the jewelry item, there will be a sense of commitment that goes way beyond simply 'choosing a ring from the Showcase'. You are then giving your client a "retail experience" that will add emotional value to the piece before they even take it home!

Also don't forget that word of mouth spreads quickly. Chances are, your customer will eagerly mention to their family and friends what a great experience they had with this amazing new design program at your store... and you know what will happen next.

Opening a Design

To Customize a design, you must first choose and open it. To do so, double-click on the thumbnail image of the design in the Showcase, The model will now display full-screen on the SketchPad (the screen in which you will alter the model), and a copy of the design is automatically placed into the active Portfolio (discussed later in this chapter).

Notice that the CounterSketch Studio interface will automatically switch from the Search tab to the Customize tab. If you decide the item is not what you are looking for after all, click on Search mode and make another selection or from the Search mode, use the Back to Collections button to start from the very beginning of the program.

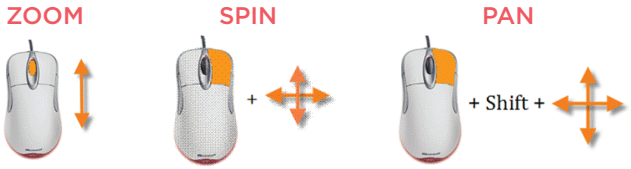
Interacting with the Design



With a design now open on the SketchPad, learn the skills necessary to control the model during the Customize phase of the design process. Spin the model for a 360° tour of the design and zoom in and out to examine the important details. Learn how to activate the pan hand and move the entire model to a new position on the SketchPad.

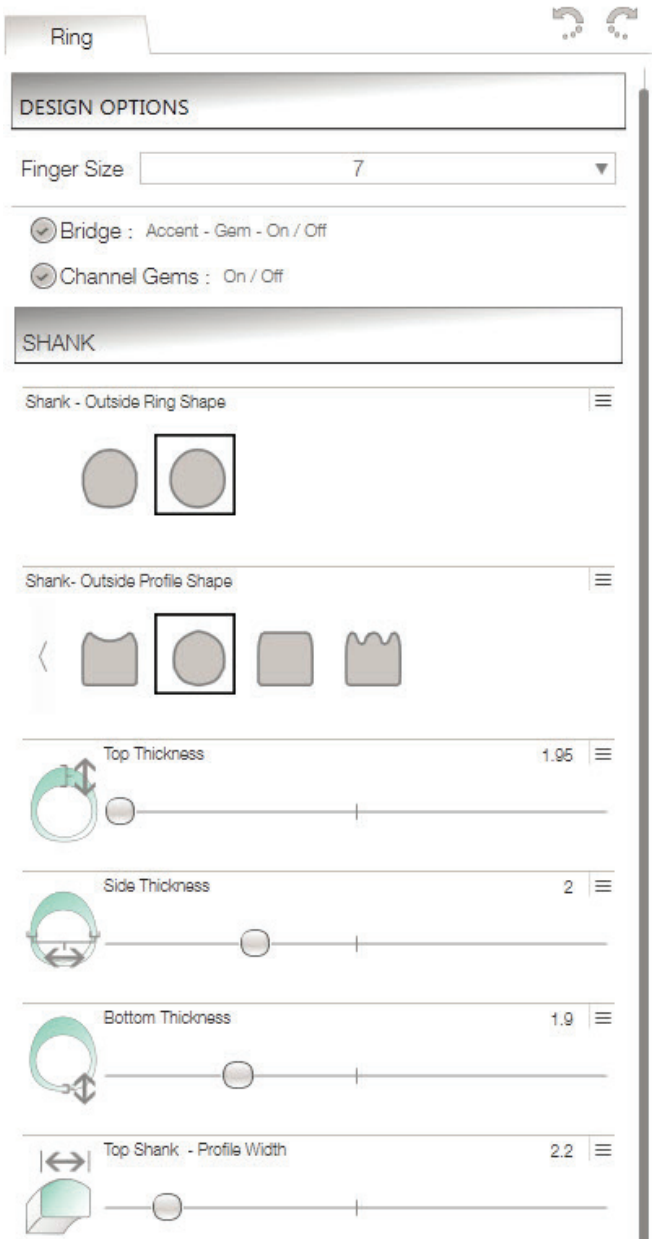
ZOOM, SPIN & PAN

Use the center mouse wheel to scroll & zoom in & out on the center of the design. If you wish to zoom in on a specific area on the model, you can control the focus of the zoom by placing your curser over the area you wish to enlarge while rolling the wheel. To spin and examine the design, hold down the right mouse button while moving the mouse. To slide or pan the design, hold down the Shift key while holding down the right mouse button. Move the mouse to reposition the model on the SketchPad.



THE DESIGN STACK

When a design is open on the SketchPad, its corresponding Design Stack (the set of controls pertaining to that specific model for customization purposes) loads along the left-hand side of the screen. No matter how similar models may look visually, each unique design in CounterSketch is created by a slightly different approach and may elicit very different design flexibility from that of other designs. It's also important to keep in mind that each design may have a completely different layout and naming convention within its Design Stack organization. Taking the time to explore designs individually opens up a design-option world brimming over with possibilities.



Design Stack Controls

Each Design Stack consists of the Design Options category and additional category controls. The Design Options are the most common controls including ring size and toggle controls to turn accent gemstones, On/Off for example. To expand each categories controls click it's title bar. Click the title bar a second time to hide them.

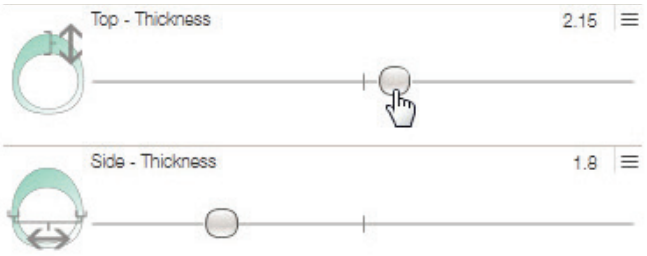
Toggle On/Off

A toggle control, or radio button allows you to choose from two different options, most commonly On/Off. The round button with a checkmark indicates the control is in the 'On' position. If a checkmark is not present, it indicates the control is in the 'Off' position. Simply click on the button to toggle between the two positions.

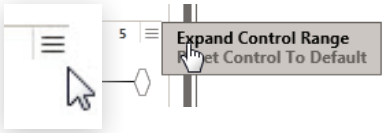


Slider Controls

Click and drag any slider control to change the overall look of the design. The model will update automatically on the SketchPad. Each slider is labeled to provide insight into what aspect of the design it controls. Some slider controls have icons next to them to help one visualize which part of the design the slider effects. Some sliders perform a lot of work 'behind the scenes', and it's imperative to give the program time to process the mathematical calculations necessary to create the design change. Hold down the Ctrl key while adjusting a slider to confine its movement to incremental measurements.



Expand Control Range

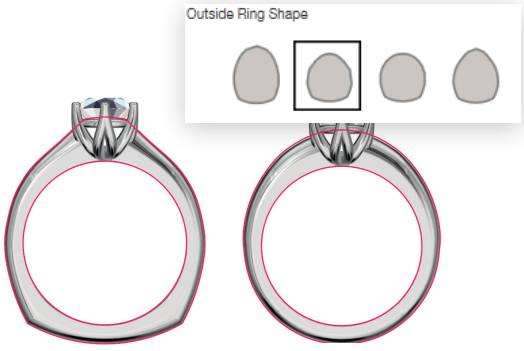


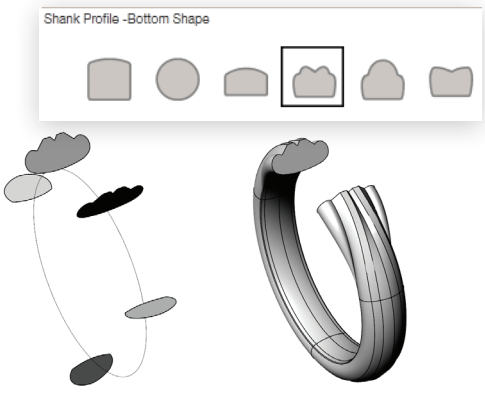
You will notice that some sliders allow you more flexibility within a piece than others. This is because the parameters were set by the individual who designed that specific piece. If you ever find that a slider's range is too limiting for your needs, look to see if the Expand Control Range option exists to the right of the slider (three small horizontal lines). Click on this menu and select Expand Control Range. This will automatically allow more space for the slider to move. You may do this more than once if you wish. This can be helpful, for example, when wanting to expand a ring shank to compliment a very large stone. Within this menu, you are also given the option to reset the slider controls to their default at any time.

Shape Choosers

Shape Chooser menus are located within the Design Stack and consist of a selection of shapes that change the overall look of the design with a click.

A shape choosers can define the overall shape of an object, or the cross-section at specific locations on the design. For example, a ring design will use a shape chooser to define the outside shape of the design. It will also determines the shape of the **Profile** (cross-section) at a specific location along the design.





CONSTRUCTION OF THE MODEL

Behind the scenes some models use a function called a ***Boolean****. A Booly-what... ? Boolean is a system of mathematical logic devised by George Boole and is used in some 3D CAD software packages. Booleans in a sense, act like large cookie cutters that cut out areas in the metal of some designs. This is good to know because sometimes a Boolean operation fails. When this occurs, an item (or a portion of an item) may disappear or may not appear as it should (such as the cut channel around a row of gems). Simply 'tickle' or reposition the slider to a new location so that the geometry makes more sense to the computer and the item will reappear.*

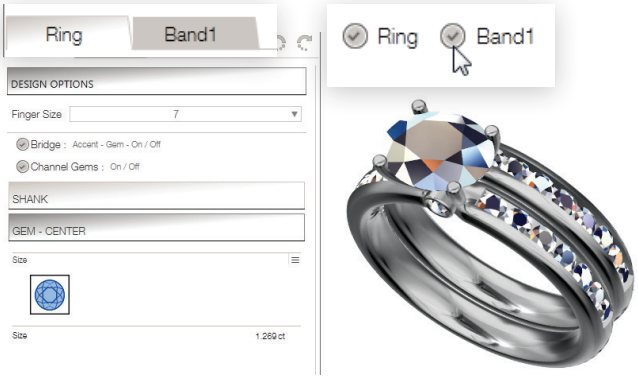
Custom Gem Sizes

Certain gems have the ability to appear in custom sizes. For example, say your customer brings in an emerald-cut stone with dimensions slightly different from the default options available. The Height (H), Width (W), Depth (D) and Percentage (**%**) are adjustable. Each dimension can be altered by typing a new value within the text box. Press enter to effect the change. Make note that the depth and percentage are linked. This means that making a change to one of the values automatically updates the other.



Matching Bands

At the top-left of the SketchPad, you will see at least one - and up to three toggle control indicating which/if any complementary jewelry components are available... The first toggle control titled Ring or Pendant (for example) is the control to turn the main design



'On' and 'Off', having it 'disappear' and 'reappear' on screen. If one or two accompanying wedding bands have also been created for the design, you will see the buttons to toggle them 'On' and 'Off'. Selecting ***Band 1*** (and/or ***2*** if available), will add a new tab with it's accompanying Design Stack created for it. You are given many design options for these accompanying bands, including whether or not you want gems and/or milgrain on the surface.



Undo and Redo

During the Customize phase of the design consultation, in the event the client liked the design *prior* to a slider control change, click the ***Undo*** last action button or ***Redo*** last action button to step backward or forward a step, one slider control change at a time.

Reset

Located in the bottom left, use ***Reset*** to remove all of the edits and start over with the original unedited Base Design.

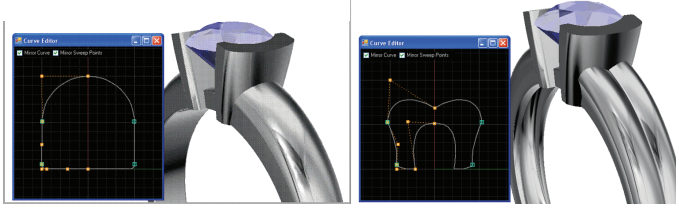
Editing Profiles

A very powerful approach to personalizing a design is to edit one or more Profiles within the piece when in the Customize mode. Editing a Profile is a quick and easy way to make distinct design changes to the model.

You can change the overall look of an entire design by simply selecting a different Profile from a Shape Chooser menu and leaving it unedited. If however, you cannot find the exact Profile or cross-section shape you have in mind, you'll now learn how to take an existing shape and change it 'on the fly'.

From the shape chooser, select the Profile you wish to edit. Try to locate something similar to the shape you wish to create (you might as well make it easy on yourself!). The Profile selected will highlight with a box surrounding it.

Take note that once the Profile Editor menu is open, you cannot move or rotate the item on the SketchPad. It is important to spin the model and zoom-in to a position where the changes taking place on the model can be easily viewed.



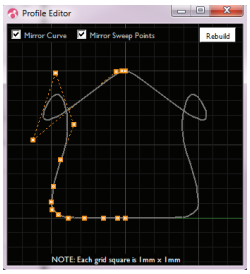
Click the small menu (three small horizontal lines) to the right of the shape chooser. Select ***Edit Profile*** and the Profile Editor menu will appear with the Profile enlarged. Small orange squares will appear along the left-hand side of the Profile shape. The orange squares are called 'Control Points'.

NOTE: *As you modify the shape of the Profile you will be able to see the changes update in real-time. Because you will not be able to change the view in the viewport once the edit window is open, orient the model to a position where the changes are easily viewed first.*

Profile Control Points

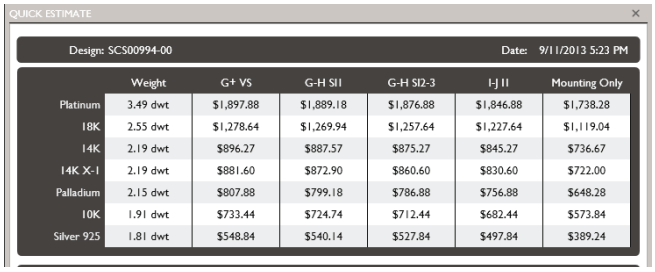
Drag any of the control points to the desired location and watch the design update automatically onscreen. Select more than one point at a time (this is called region selecting), by holding down the left mouse button and dragging a box from left to right around multiple points. The selected points will highlight. You can then drag all of the selected points simultaneously to the new location. When done with the alterations, click the ***X*** in the upper right-hand corner to close the Profile Editor menu. If you wish to return to the original Profile, enter the options again and select ***Reset Control to Default***.

NOTE: *Do not overlap control points. Doing so will create invalid geometry causing problems with manufacturing and can effect the accuracy of a quote.*



Quick Estimate

When it is time to talk dollars and cents with your client, use the ***Quick Estimate*** button to determine a price estimate. Under the ***CounterSketch Menu> Preferences > Estimate Settings*** you will select the metals and gems you wish to receive price and weight information on. An up-to-date cost is returned based on the quality of the gem and the metal weight *(See Quick Estimate within Account Info & Preferences for more)*.



	Weight	G+ VS	G-H SI1	G-H SI2-3	I-J I1	Mounting Only
Platinum	3.49 dwt	$1,897.88	$1,889.18	$1,876.88	$1,846.88	$1,738.28
18K	2.55 dwt	$1,278.64	$1,269.94	$1,257.64	$1,227.64	$1,119.04
14K	2.19 dwt	$896.27	$887.57	$875.27	$845.27	$736.67
14K X-I	2.19 dwt	$881.60	$872.90	$860.60	$830.60	$722.00
Palladium	2.15 dwt	$807.88	$799.18	$786.88	$756.88	$648.28
10K	1.91 dwt	$733.44	$724.74	$712.44	$682.44	$573.84
Silver 925	1.81 dwt	$548.84	$540.14	$527.84	$497.84	$389.24

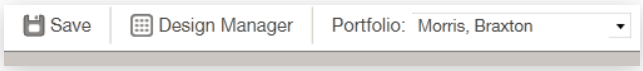
DESIGN MANAGER

The Design Manager organizes and archives design sessions and is used to document the design consultation. Portfolios are created for each individual design consultation and are housed within the Design Manger. Base Designs (unedited model) appear in the left column (vertically). Each saved step or Design History will appear horizontally in a row to the right of it's Base Design. Store valuable customer information, view the Design History and Favorites all within this powerful feature.

Portfolios can be used to create meaningful demonstrations based on customer demographics. The Design Manager and its associated Portfolios are an integral part of the design and presentation process.

Save

Alter a design as desired and while making changes, document this process step-by-step. Save each new change by clicking the Save button located at the bottom of the SketchPad within Customize and Freehand mode. This process is called 'Storyboarding' and is an important habit to get into when working with clients. After clicking Save, the design will animate and minimize towards the save button. This visual cue indicates the image was saved to the active Portfolio. The active Porfolio is listed at the bottom of the SketchPad. It defaults to {New Portfolio}.

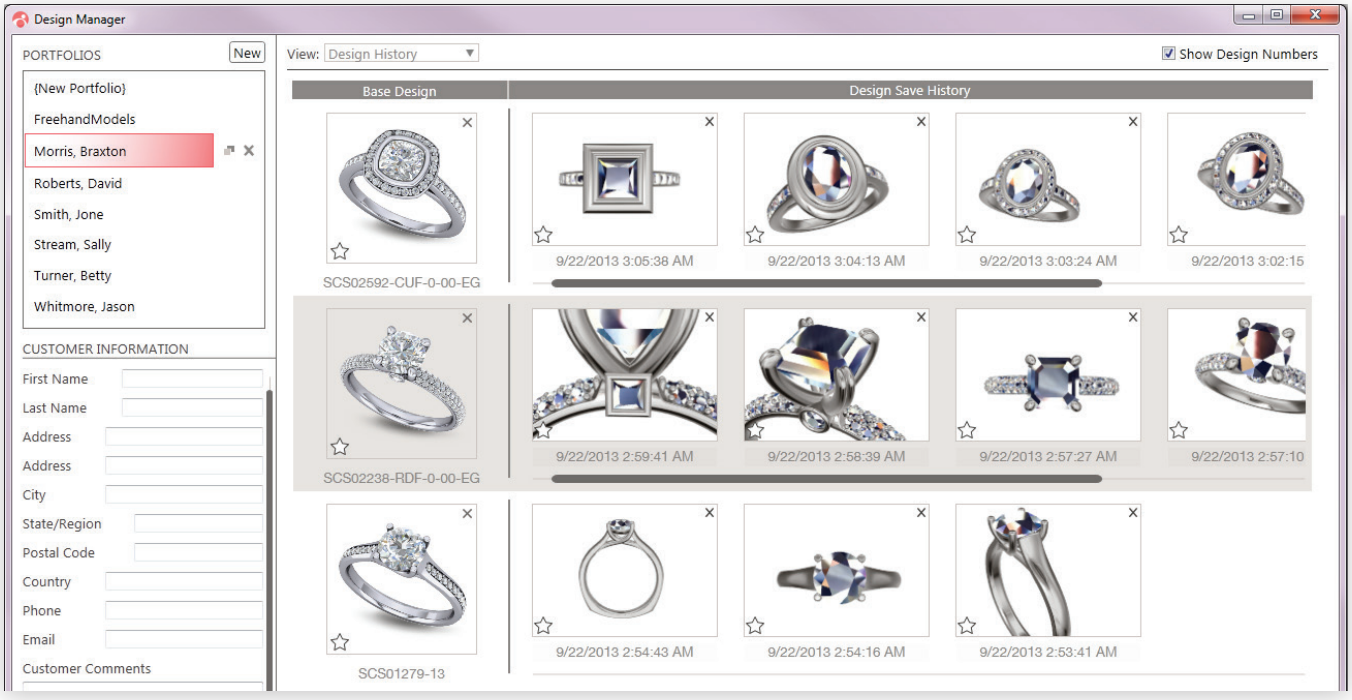


Make sure to listen to your customer's verbal cues. If the customer likes the direction the design consultation is headed, save the changes throughout the entire design process. Due to your diligent habits, you can refer back to any stage of the consultation you and your customer desire. If the customer decides they don't like the direction the consultation is headed, you can simply load the design from any of the save points within the consultation.

INVOLVEMENT IS KEY

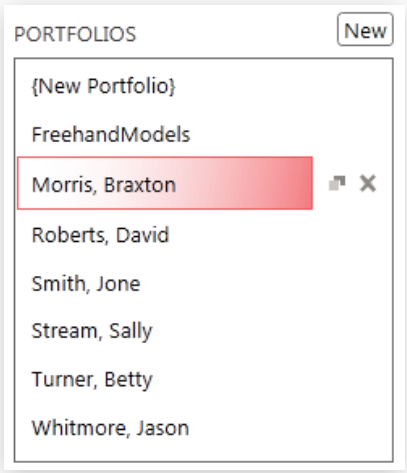
During a live design consultation, be sure to keep the client involved. Don't forget to ask them lots of questions so you have a clear idea where you're heading in the program. Remember, it's not about what the program can do, but about helping your customer create the design of their dreams!

The more fun you have, the more fun they will have and the more invested they will become in the entire process. If using the program is nothing but work for you and your customer, the whole point of CounterSketch Studio has been lost. It's whole concept and design is for creating a fun and interactive jewelry selling experience!



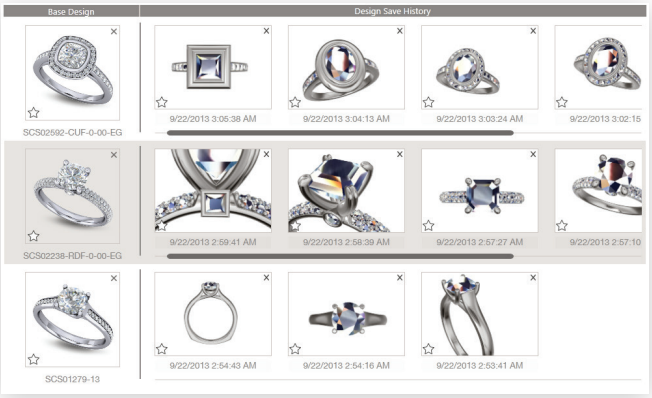
Design Manager

After designs are saved to a Portfolio and you wish to retrieve one, simply click on the Design Manager button to view all of your saved designs (Design History) and their associated Base Design (the unedited version of model as it appears in the Showcase). The Design Manager menu stores all portfolios and their associated customer information.



In the top left corner you will see all Portfolios listed in alphabetical order. Below you will find the customer information for the active Portfolio (highlighted).

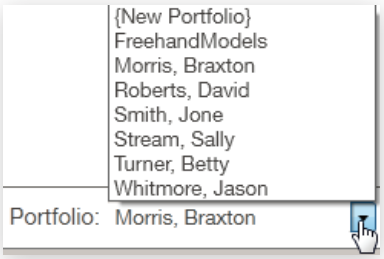
Each Portfolio organizes all of the Base Designs (unedited model) vertically in a column along the left. Each saved step will appear horizontally in a row to the right of it's Base Design. The most recent Save point is listed first, next to its Base Design. This organizational method pairs all of the Save points (Design History) with its Base Design helping you keep associated designs grouped so that when you are reviewing the consultation with your client, you can easily discuss their design options.



TIPS FOR SAVING

Save Points are instrumental in visualizing changes throughout the design process. Rotate the model to a meaningful position and zoom-In to display relevant design elements when saving. When reviewing the design, the vantage point of the save is documented leaving you a visual cue of that particular point in the design consultation.

Load a Portfolio



Access saved Portfolios using the drop down menu located at the bottom of the Sketchpad and choosing the desired Portfolio. After loading a Portfolio, the Save feature will store the save point under the active Portfolio.

Additionally, you can access all Portfolios by clicking on Design Manager located along the bottom of the SketchPad. The Design Manager menu will appear and located in the top left corner you will see every saved Porfolio listed alphabetically. Use the scroll bar to navigate through the list and click on any name to load the corresponding Portfolio.

NOTE: *Designs that were marked with a green checkmark and saved to a portfolio will appear in the Base Design column of the portfolio.*

Load a Design

To open a particular design from a Portfolio, double-click the desired thumbnail image and the corresponding design will open full-screen on the SketchPad. If you wish to revisit a save point, re-enter the Design Manager and repeat this sequence.

NOTE: *When loading a design from the Portfolio Manager onto the SketchPad when one already exists there, CounterSketch will ask if you wish to save the item currently on the screen first. Choosing* ***No*** *will overwrite the design, losing it if it has not previously been Saved.*

New Portfolio



Click on New located in the top left corner of the Design Manager to create a new blank Portfolio. You will then be prompted to enter the desired name for the new Portfolio and click Create. If you change your mind and decide a new portfolio is not needed, click Cancel.

Naming Portfolios

At any point during the consultation a Porfolio can be created. By default, a temporary portfolio is automatically loaded under the name {New Portfolio}.

The current Portfolio is listed at the bottom of the SketchPad. To rename the Portfolio, simply double-click on the title, making it highlight. Type the new title into the text box. Pick something that is logical and easy to remember. We recommend using the customer's last and first name, then month and year of the design session. When you are ready to save simply hit Enter on the keyboard. Keep in mind that if you began in the {New Portfolio} and decide to rename it, a separate Portfolio will be created with the name you assigned, leaving the {New Portfolio} Portfolio blank and unchanged. If, however, you began with another named Portfolio (say a 'Demo' Portfolio), when you change the name, it changes that Portfolio permanently.

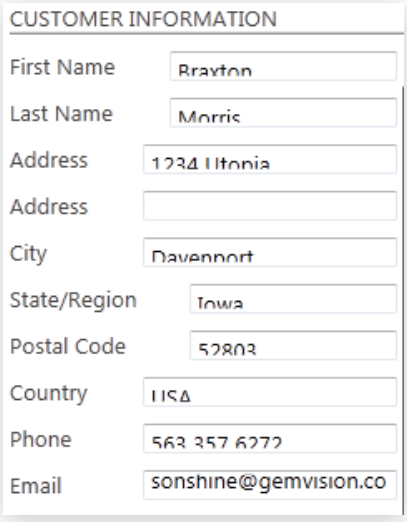
An alternative option for renaming a portfolio can be conducted within the Design Manager. Simply click on the desired portfolio and choose Duplicate. Enter a new name and click Create.

USER TIP

Create a naming convention for Portfolios and implement it consistently in your store. If all your employees use the same naming convention, it will be easy to locate files in the event an employee is out of the office or leaves the company completely.

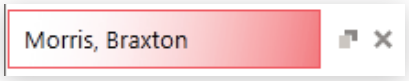
Customer Info

You also have the option to enter your customer's information here, including First and Last Name, Phone Number and Address. The information will automatically transfer to Order, saving you a step when ordering a piece from this client's Portfolio. You may also opt to leave out this information and fill it out later during the ordering process.



Delete Portfolio

Delete a Portfolio and its corresponding Base Designs and Design History files permanently from Counter-Sketch Studio and your computer by entering into the Design Manager and clicking on the name of the Portfolio to active it. After doing so two icons will appear. Click the small 'X' and dialog will appear asking "Delete current Portfolio?". Click Delete to permanently remove the files. Cancel will leave the files untouched.



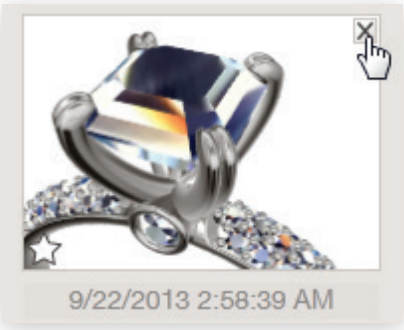
Delete can help to manage your files and get rid of old or outdated information. Keep in mind, however, that memory storage is not all that expensive and old client information can sometimes be useful. One example would be when a husband needs some help with an anniversary gift for his wife. An old Portfolio to browse might help him (and you!) visualize his wife's aesthetic. Load the Portfolio and custom design a pair of earrings to complement her engagement ring!

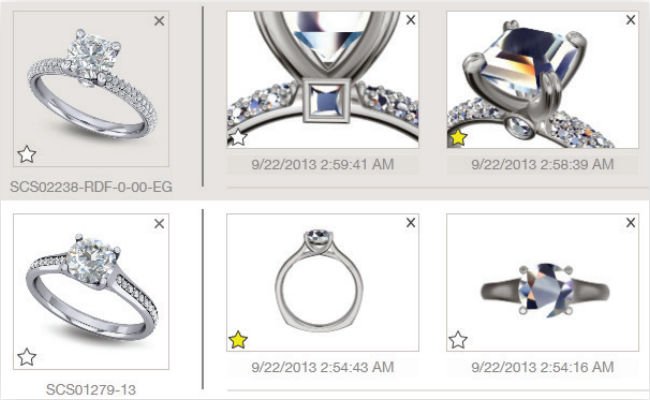
Duplicate Portfolio

This option allows you to begin with an existing Portfolio – i.e. a Demo folder you created to target a specific demographic – and Duplicate it under a new name when your 'demo' turns into a sale. By doing so, you will leave the Demo folder intact while creating a new Portfolio under your customer's name. Simply enter the Design Manager and highlight the name of the Portfolio you wish to copy and the Duplicate icon will appear (two small boxes). Click the icon and dialog will appear asking "Create a Copy of this Portfolio?". Enter a name into the text box and Click Create. Choosing Cancel will revert the action.

Deleting Saved Designs

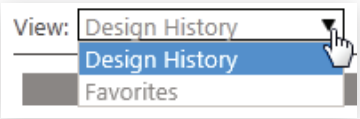
Delete any unwanted step or Save during the design consultation by entering the Design Manager and clicking the small 'X' located in the upper right-hand corner of each thumbnail image. After doing so the option to Delete will appear. Clicking ***Yes*** will permanently remove the thumbnail image and its associated file.





Favorites

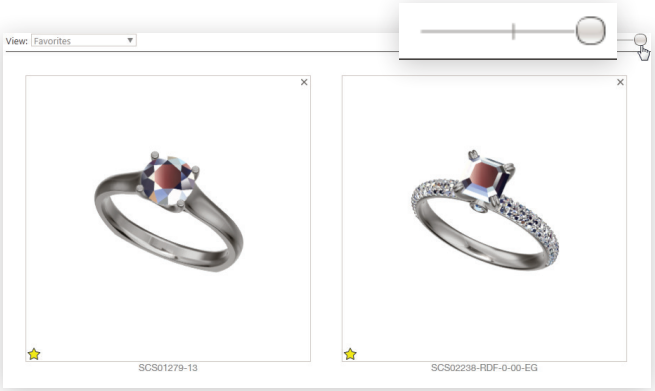
The concept of Favorites helps with the decision-making process, allowing you to quickly mark and identify important designs during the consultation and review them later. If your customer indicated the design is a Favorite, click the Star icon located in the bottom left of each thumbnail image within the Design Manager. Add a star to make this indication. Later, when reviewing the design consultation and looking at the 'storyboard', the Favorite icon will be a helpful reminder of the designs importance.



Sorting the View

The Portfolio Manager can be sorted to display the Design History or you can filter the view further and display only the items marked as Favorites. Doing so allows the customer to compare and contrast the different design alterations they have created by viewing them side-by-side reviewing only the items they really like and eliminating the less important steps along their design journey. Remember, the process of elimination is an important step and helping your customer to focus on top choices or Favorites can help quiet the visual distractions and pinpoint the item they wish to Order.

By default the Manager is set to view Design History which includes every Save point (including Favorites) as well as the Base Designs. To isolate and view only Favorites, locate the View drop-down menu and choose Favorites. The Favorites view will display all designs at the same angle so they are easily compared. Use the slider bar located in the top right corner to make the images larger. Scale the menu down to provide a more in-scale view of the item or to see more results. From within this view you can 'weed out' designs from within this menu by clicking the stars to deselect them. Helping your client make their final decision.



FAVORITES VIEWER

Mark your customers favorite Designs and view them all at once with the Favorites Viewer. This function helps you narrow down their top selections by comparing the designs side-by-side.



Show SPI Number

The options to Show SPI number can be toggled 'On' to see the models corresponding sku number. The SPI can be entered into a keyword search.

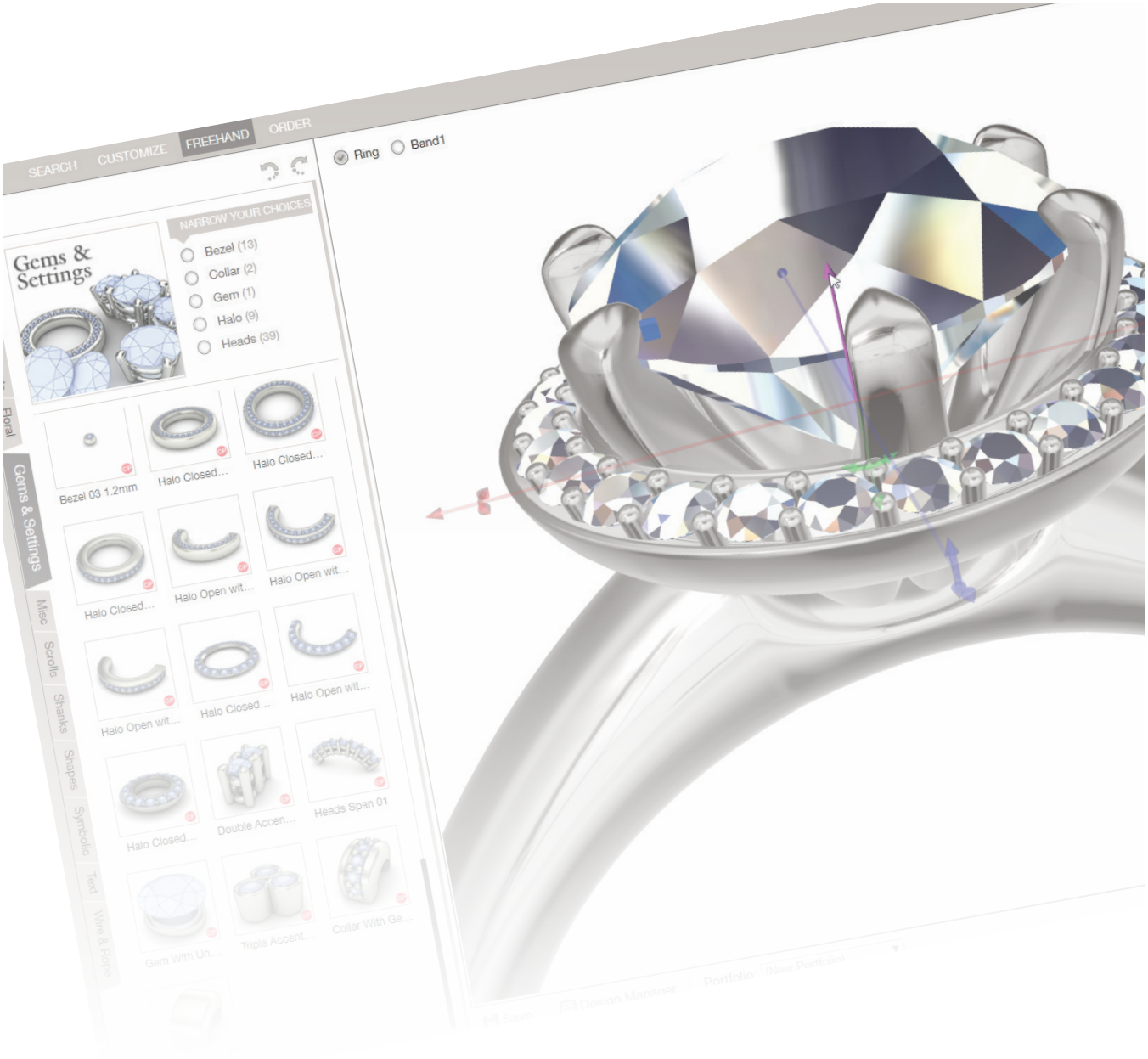
DEMOGRAPHIC-SPECIFIC PORTFOLIOS

Make Portfolios which cater to specific demographics. Ex: Be prepared to present a meaningful demonstration to someone who pops in the store before going to their appointment next door. Plant the seed when a client brings a friend along for company. Try creating a Portfolio that you can quickly run through with a potential customer that effectively demonstrates this amazing technology. You never know, a high-paying customer may be watching!

BACKING-UP YOUR PORTFOLIOS

All Portfolios are saved to the computer's hard drive and can be recalled at any time. It is recommended to back-up your saved Portfolios on a regular basis.. Go to CounterSketch Menu > Backup > Backup and save a second copy of the information in a loca-

tion other than the existing computer (another computer in your store, at home or on an external hard drive), to ensure your information is safe and will not be lost. In the event the computer's hard drive does fail, the Portfolios can then be restored (See Backup/Restore for more).



CHAPTER 3

Freehand Mode



INTERACT WITH THE DESIGN

Choose design elements from within the Freehand Mode library and add them to your model. Use the new Viewport Control Handles to Move, Scale, Rotate and Bend a part until it looks just right. Freehand Mode remove design limitations and allows you to explore your creative side. Go ahead, imagine the possibilities!

FREEHAND MODE

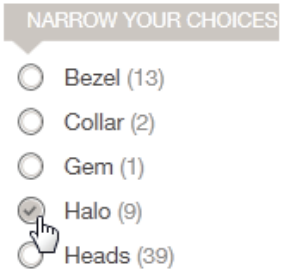
Freehand Mode offers an entirely new way of modeling and gives you more power to delight your customer than ever before. Add gems and design elements to an existing CounterSketch design, or create a new design from the ground up. Freehand Mode enables you to say 'yes' to every design request a customer makes.

Whether you are working in Customize mode and decide to enter Freehand mode to add embellishment to an existing design, or if you start in Freehand mode with a blank screen and build your design from the ground up, remember the importance of including your client in the design decisions. Involving them in the decision-making process gives them a feeling of ownership over the creation of their design and will go a long way to closing the sale.

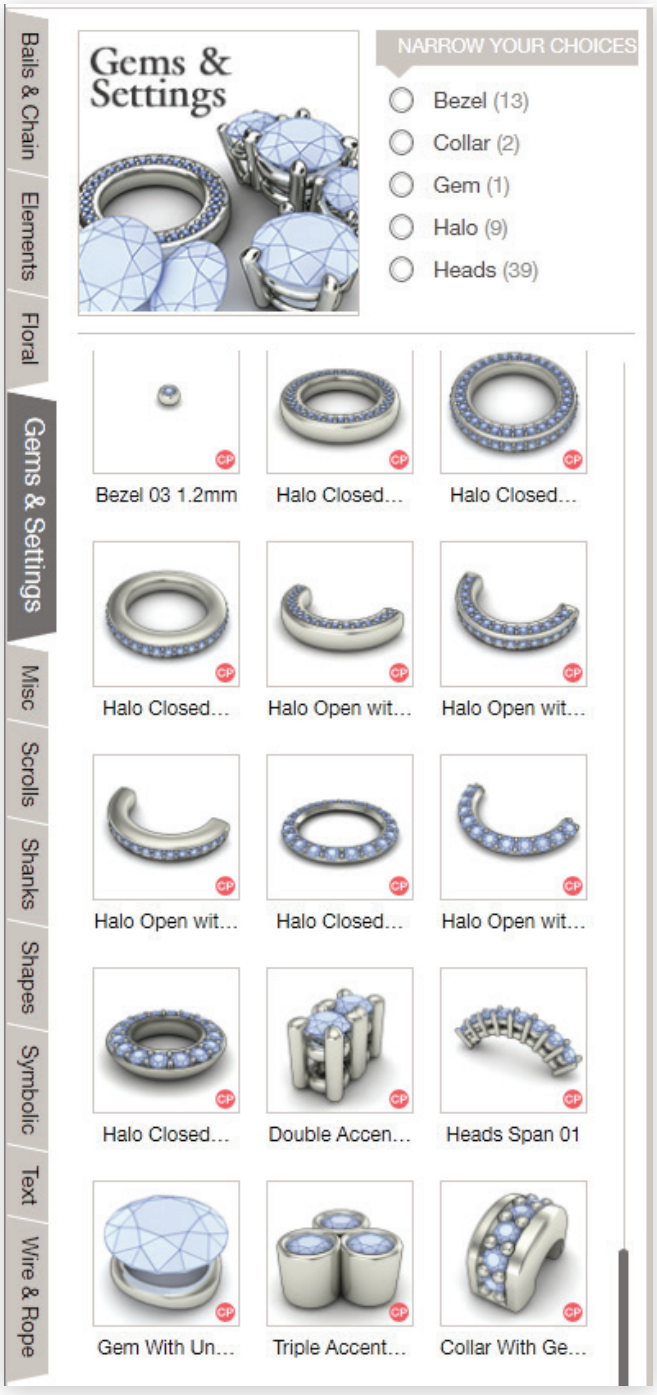
Navigating the Library

To get started, click on Freehand mode in the top-left corner of the interface. Once in Freehand mode, small tabs located along the left side house a variety of parts that can be added - even in combination - to an existing CounterSketch design, or can be used solely to create a model from scratch. Click on any tab to load and view it's associated library. Use the scroll bar to the right to peruse the items.

By default the Gems and Settings tab is active when entering Freehand mode. At the top of the menu filters are listed to help you narrow your choices and identify the part you require. These filters are also an ideal way to determine whether parts are complementary to one and other.



Toggle 'On' the radio button of the filter you wish to display. A small number next to the filter indicates the number of parts available



within that filter. If you know that you are looking for a Halo, for example, use this filter to quickly eliminate every part that does not match that specific criteria.

If you are wanting to design a very three-dimensional and sculptural Floral item, you may decide to toggle 'On' Chiseled, Domed and Grooved - eliminating all of the Flat parts that do not compliment your design.

After identifying the part you wish to explore, double-click the thumbnail image to load the part onto the SketchPad. The type of part you choose will determine the controls you have to manipulate the object.

Library Part Types





There are two different part types that are easily identifiable by the icon in the bottom-right corner of each parts thumbnail image. A small 'CP' indicates that it is a CounterPart. If no icon exists in the lower corner of the thumbnail image, this means it is a Design Element. It is important to understand the difference between these two distinct part types.

NOTE: *CounterParts can be easily identified by the small circle with a 'CP'. This icon will not appear on a Design Element.*

CounterParts

Identifiable by the small circle (with a 'CP') in the bottom-right corner of the image, a **CounterPart** is a parametric part with associated slider controls - similar to a models Design Stack in Customize - that can be used to manipulate and alter the item in countless ways. After loading a CounterPart onto the SketchPad, its associated slider controls automatically appear along the left side of the interface. Title bars, indicating the types of controls that you will find are listed. To expand each set of controls, click its corresponding title bar. Click the title bar a second time to hide them. Explore the Design Stack using the sliders, toggles and shape choosers. (For a refresher on how to manipulate a Design Stack look to Chapter two, titled "Customize".)

Design Elements

Unlike CounterParts, **Design Elements** have no associated sliders. Design Elements are static parts that can be manipulated using the Viewport Control Handles. Read on to understand how to manipulate a CounterPart or Design element using VCH's (Viewport Control Handles).

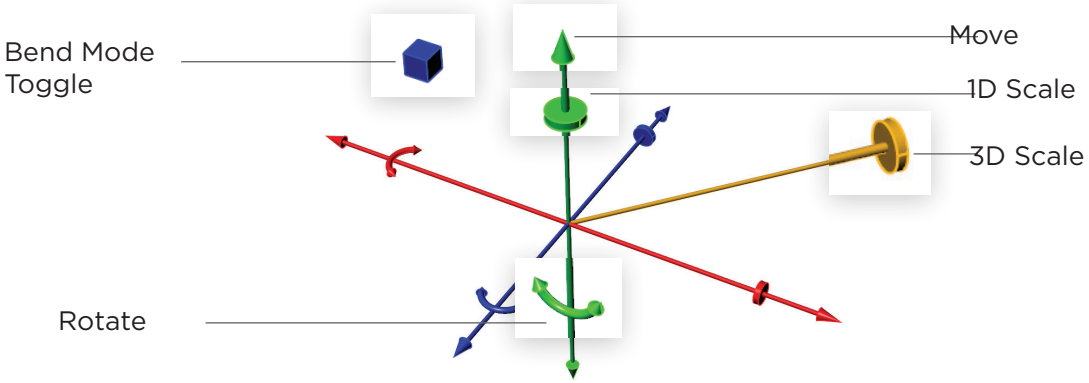
USING COUNTERPARTS AND DESIGN ELEMENTS

Viewport Control Handles

The Viewport Control Handles used to control CounterParts and Design Elements are similar, *but not the same*. A CounterPart, at a minimum, can be moved and rotated, and many CounterParts can also be bent. If gemstones are included in the CounterPart, this will usually eliminate the Bend control. But don't be fooled, the added functionality within the Design Stack allows versatility that will allow you to manipulate CounterParts to your heart's content.

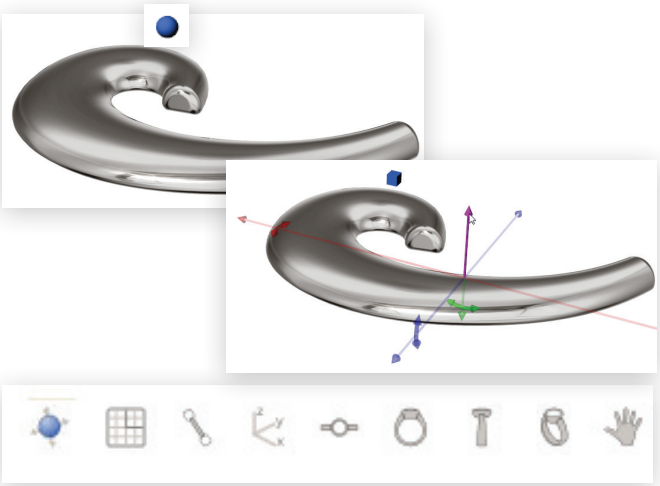
Design Elements are static parts that have more ability within the VCH's. Easily Move, Scale, Rotate or Bend a design element on the SketchPad to fit with your design motif.

NOTE: *The Viewport Control Handles(VCH) that are available depend on the type of library part being customized. Each axes control can be identified by the VCH's color. The Bend handle toggles the controls into an entirely different mode.*



Viewport Control Handle Toggle

After selecting a part in the Freehand library and double-clicking, it will appear on the SketchPad and a small blue sphere will appear next to the item. Click the blue sphere to toggle on the item's Viewport Control Handles.

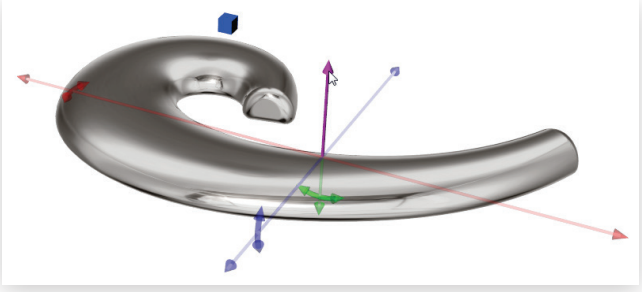


To temporarily remove the blue spheres from the SketchPad, use the VCH Toggle within the Display Controls located along the top-right corner of the interface. This first icon in the Display Controls temporarily removes all of the blue spheres from the screen so you can view the design without the visual interruption. Remember to toggle the blue spheres back 'On' giving you access to the Viewport Control Handles when you wish to further alter the part.

NOTE: *Viewport Control Handles are accessible by clicking on the blue sphere that appears next to the Design Element, or CounterPart. If the blue sphere is missing, toggle them 'On' using the first icon within the Display Controls (located in the top-right corner of the SketchPad).*

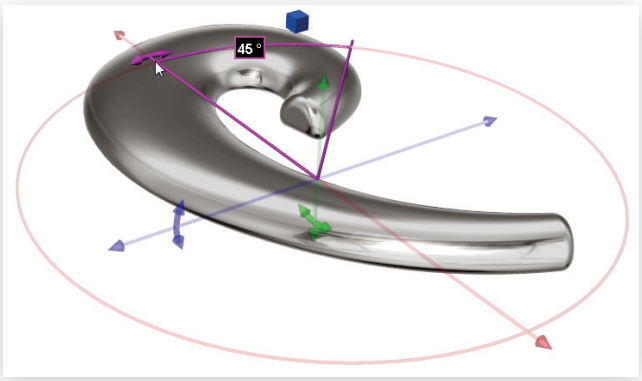
Move

CounterParts and Design Elements can be easily repositioned on the SketchPad using the Move handles. The Move handles are identifiable as small cones and are located on each of the X, Y and Z axis. These controls allow you to Move a part in one axis at a time - either left to right, towards and away, or up and down. To do so, hover your mouse over the appropriate Move handle until it highlights. Once highlighted, right-click and drag the end of the axis you wish to move, to its new location.



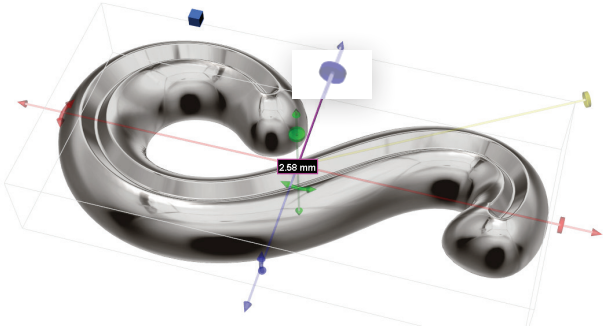
Rotate

Use the Rotation control handle (one for each axis), to rotate an object into position. Rotate handles are identifiable as a curved line with a double arrow. Hover your mouse over the control and it will highlight with a full circle, indicating which axis you will be rotating along. As soon as you begin the rotation, a dialog will appear reporting the angle of the rotation in degrees. This is helpful information in the event you have another part you wish to match the angle to. Holding down Shift while rotating will confine the rotation angle to 15 degree increments. This is extremely helpful to quickly rotate 45 or 90 degrees. Each time you use the Rotation handle, the angle will reset from 0 degrees, so if exact measurements are needed, *pay special attention to this information.*



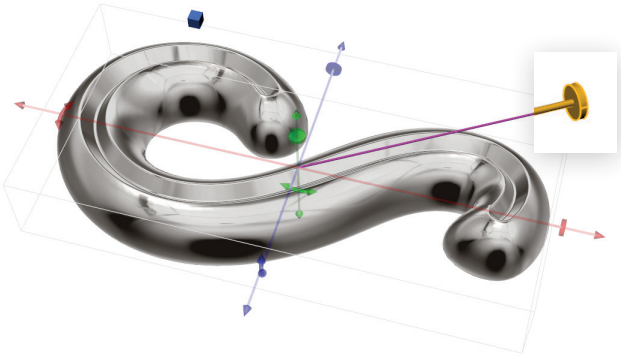
Scale

Design Elements have an additional Scale control which allows you to quickly alter the size and aspect ratio of the part. Scale handles appear as discs located just below the Move handles (cones at the end), and can be located on the X,Y and Z axis. Hover your



mouse over the Scale handle and it will highlight and a small box will appear, surrounding the object. This cube, or bounding box is used to measure the object and feedback will appear at the center of the part, indicating the size in millimeters of the part in that particular dimension.

If you wish for the object to be larger or smaller and to maintain the exact aspect ratio (relative size in each axis), use the 3-dimensional Scale handle which appears as a yellow disc.



NOTE: *Only one object can have Viewport Control Handles at time. Toggle between different objects by clicking on its corresponding blue sphere.*

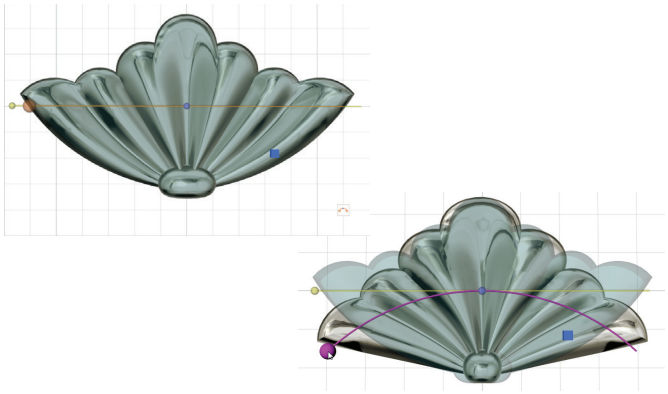
NOTE: *Use Undo and Redo to step backward or forward.*



Bend

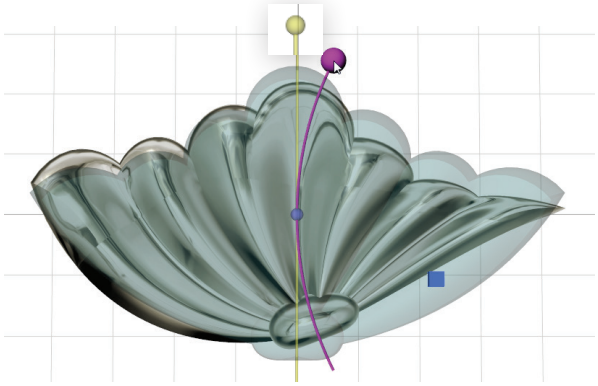
The Bend control allows you to manipulate Design Elements so that they conform to the overall shape of the part you are mating them to, or perhaps to fit them into an opening, etc. Bend can also be used to drastically change the overall appearance of a Design Element.

Access the Bend handles by activating the Viewport Control Handles, then clicking the blue cube. The blue cube toggles between three options; no handles, VCH handles (Move, Scale and Rotate), and Bend.

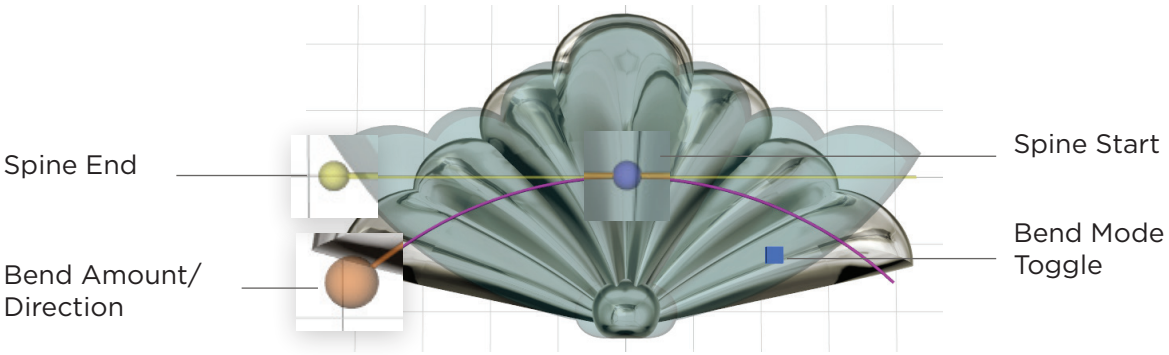


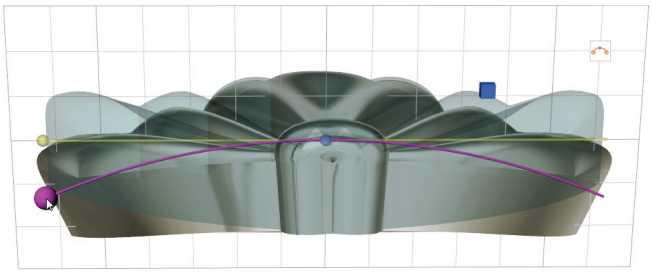
When Bend is activated, a grid appears that runs through the object, indicating the plane on which the bend will take place. Bend the object by clicking and dragging the large orange sphere up or down, and in or out. A shadow of the object previous to the bend will remain, indicating the original shape.

Adjust the amount an object is affected by the Bend by repositioning the Bend Spines start point and end point. When the points are close together, small adjustments will make drastic changes. Click and drag the Spines Start Point 90 degrees to change the direction in which the object will bend.



Change the axis in which you are bending by spinning the Viewport so that you are looking flat at the object from the vantage point in which you would like to bend. The grid behind the object will reposition itself, providing you a visual cue as to which axis the bend will occur.



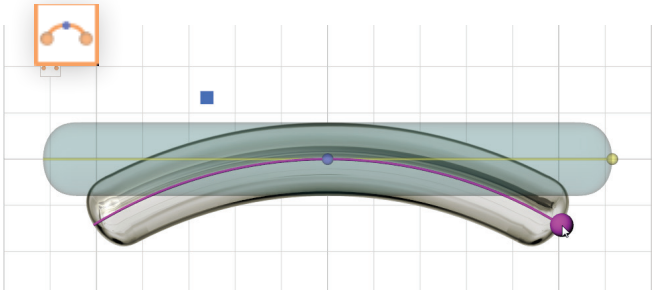


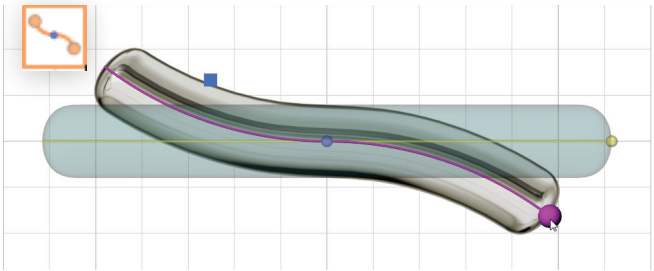
NOTE: *Located at the top-right of the interface, toggle between Top Down, Through Finger and Side View to quickly change vantage points. Remember to toggle back to Perspective View if you wish to spin the design on the SketchPad.*

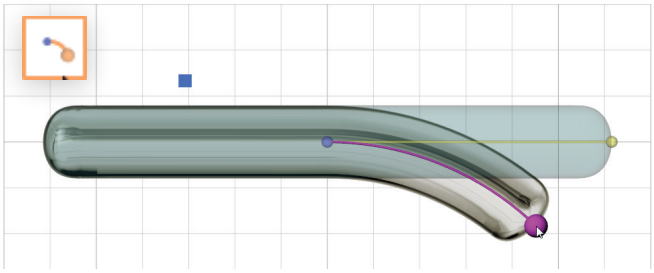


There are three types of bends that affect how the part is manipulated; Symmetrical, Opposite, and One Side. While in Bend mode, toggle between these three types by clicking the small Bend icon located slightly above and to the side of the part.

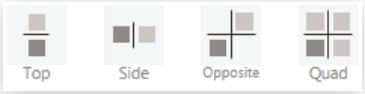
Symmetrical bends both sides of the object in the same direction. Opposite bends both sides in opposite directions. One Side, bends one side of the model independently from the other. The side which is affected can be changed by adjusting the Bend Spine end point.







Mirror

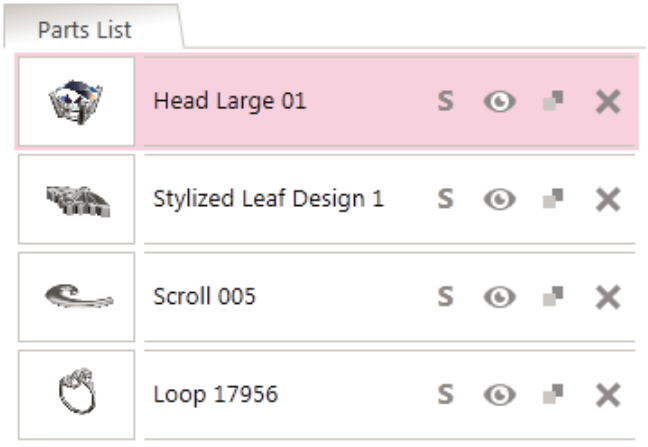


Quickly Mirror parts from Front to Back, Side to Side, Opposite, or across all four quadrants using the Mirror tools. When a part is on the Sketchpad, the Mirror tools are located at the top of the Stack within Freehand mode . The graphical icons will help you determine which Mirror mode to use. After toggling on one of the Mirror types, the icon becomes highlighted as a visual indication that this Mirror is 'On'. Be aware of what you have just clicked. Mirrored parts can appear on top of one another and there is no visual cue when this occurs. This can cause your quotes to be inaccurate. Imagine if you have a Halo Counterpart with fifteen gemstones mirrored using the Quad option. If the parts were in the exact same location, it would appear as one object. However, its mirrored CounterParts would have forty-five gemstones, adding to a hefty price tag.

NOTE: *When using the Mirror options,* ***make sure that you do not have overlapping gemstones*** *that are not accounted for, as they can cause inaccurate quotes.*

Parts List

After loading any Design Element or CounterPart onto the SketchPad, the Parts List becomes available at the bottom-left of the interface. This list can be repositioned up or down, by clicking and dragging the list.



Each time you add a part to the SketchPad, it will be added to the bottom of the Part List. The highlighted CounterPart's associated Design Stack (if available) will load above. Simply click on another part in the list to view its controls and activate its Viewport Control Handles. As an alternative, click on the blue sphere on

the SketchPad and the corresponding Design Stack will highlight within the Parts List.

Each Part in the Parts list has a small thumbnail image, it's title, and to the right of the title there are a number of controls available. These controls from left to right are as follows; Metal Assignment, Show/Hide, Duplicate, and Delete.



The Metal Assignment toggle (a large 'P' or 'S', depending on which is active), allows you to assign the part as either a Primary, or Secondary Metal, and corresponds to the metal options displayed along the right side of the interface.

Show/Hide(eye icon) will toggle the part 'On' or 'Off'. This is especially useful when comparing parts and making design decisions.

Customize a part to your exact specifications using the Viewport Control Handles, then use the Duplicate command to create an exact copy. The new part will appear in the exact location as the original - *so make sure to move it to a new location*. Continue manipulating either part as desired.

Delete will permanently remove the part from the Parts List and the SketchPad. The part still remains in the library, and can be added again at anytime by navigating to the part within the library and double-clicking to bring it back out onto the SketchPad.

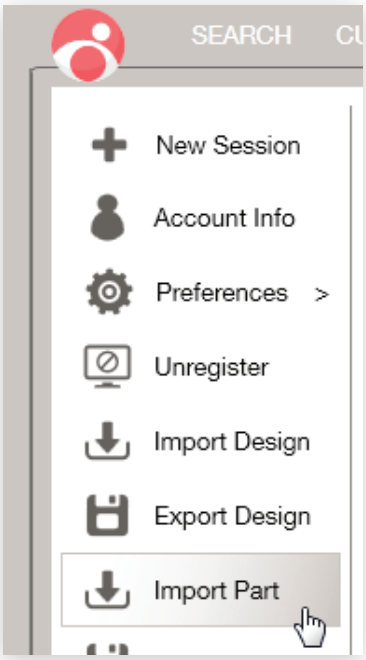
NOTE: *As your designs become more complex you may wish to view the design without the distraction of the blue spheres. To do so, toggle them 'On' or 'Off' using the first icon in the Display Control Panel located in the top-right corner of the SketchPad.*

SHOW AND HIDE TOGGLE

Use the Show/Hide toggle to compare alternate design options for your client to choose between. Including your client in the design decision-making creates a feeling of ownership over the design and makes for a fun and exciting shopping experience.

Import Part

Can't find exactly what you are looking for but have a Matrix file that is exactly what you need? No problem. Import your Matrix part right into the CounterSketch Parts Library. To do so, the file must be saved as a .3dm (default file extension within Matrix). Next, locate Import Part from within the Countersketch Menu (CS Icon in the top-left corner of the interface), and navigate to the location on your hard drive where the file is saved. Then choose Open. After doing so, a new tab titled "User" will appear and your part becomes available as a bona fide CounterSketch Design Element.



NOTE: *Make major adjustments to the ring size and overall shape prior to entering Freehand mode. This will save time and energy so that after designing the item with CounterParts and Design Elements, you will not have to reposition all of the items onscreen because of a change to the finger size.*



CHAPTER 4

Appearance



SEND THEIR DESIGN HOME WITH THEM

With photo-realistic rendering at your fingertips, CounterSketch makes it easy to email your customer their finalized custom design. You also have the option to print and send it home with them. Using this amazing feature will reinforce to your customers that they chose the right jeweler.

PRESENTATION

CounterSketch contains helpful tools you will use to create polished presentations. The functionality within the program allows you to immediately change the materials assigned to the jewelry item on the SketchPad, create stunning images using the Render features, and help your client visualize what their custom design will look like while it's being worn using the Try On feature. These tools will assist you in presenting and selling with CounterSketch Studio.

Display Controls

Running along the top-right-hand corner of the SketchPad are the Display Controls. The icons from left to right are:



Show Hide Viewport Control Handles displays the Viewport Control Handles within Freehand mode.

Show / Hide Grid Lines displays a grid representing millimeter increments for reference purposes when modifying a design.

Show / Hide Curves are colored lines appearing on and around the piece, and are used during the design's creation process. In certain situations it is helpful to see the curves in the design to better understand the effect of a slider control.

Show / Hide Grid Axis displays the X, Y and Z Axes.

Top View, **Through Finger View**, **Side View and Perspective** allow you to view the design from their corresponding angles. Click Perspective View to return to the view that automatically loads when the model is initially loaded onto the SketchPad.

Try On See Try On section.



Try On

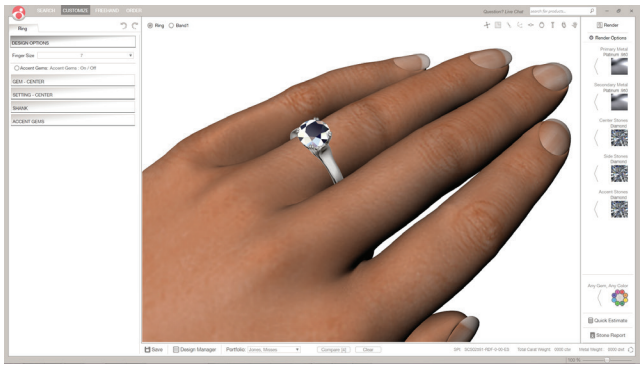
The last icon in the Display Controls menu is Try On (hand icon). Use this feature to help your client visualize in-scale how their ring design will look on their own hand! Begin with the chosen design on the SketchPad and click the Try On button located in the upper right-hand corner. Select the finger on which to display the design. The hand model will appear in the viewport and your design will appear on the finger selected within the diagram.

Select the gender using the drop-down menu. The band may load a little higher or lower on the finger than how one might naturally wear it. Use the Location slider below the image of the hands to adjust the ring's position on the finger.



Next, select the closest match of your client's Skin Tone and Nail Color for a more realistic representation of how the ring will look on their hand. Choose Flip Design to rotate the ring 180˚ for asymmetrical gems or designs. After you are satisfied with your selection, click OK. To revisit the menu, click the Try On icon.

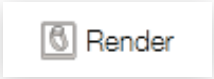
After the hand is applied, continue to use the **Design Stack** and make real-time design adjustments on the ring. The changes take place and display automatically. At any time, rotate and zoom in and out to view the design from all angles. Use the hand to help a client visualize how high the stone will sit or how the stone size will look relative to the hand. Who knows, you might even be able to up-sell the diamond! To deactivate the feature, simply click Try On to re-enter the menu and choose Remove.



DOES SIZE REALLY MATTER?

The Try On feature help your customer understand the scale translation from a computer monitor to a live jewelry item. The client can keep a real world perspective about the size of the diamond, how high the stone will sit off the finger and the proportion of the ring in relation to their hand.

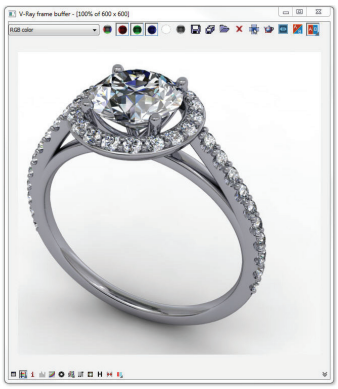
Render



Although the image onscreen does a fantastic job of communicating the finished designs overall look, you can take it one step further and Render the item with the powerful and user-friendly Render feature to create a stunningly-realistic photo image to send home or email to your customer. The Render feature utilizes the latest technology offered by V-Ray in conjunction with exclusive rendering materials that were created to reflect a wide variety of gemstone options, most of which are available for purchase through Stuller. The Render tool can also be used to create multiple versions of the same ring, displayed with a variety of gem and metal colors for marketing materials or websites. Your virtual inventory possibilities are endless!

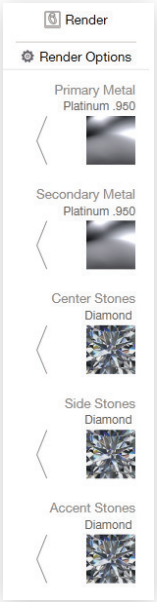
Click Render at any point during the design consultation to see the current materials rendered to your specification. The image created will directly reflect the SketchPad. Spin and zoom the design to create the composition of your choice prior to clicking Render.





Metal and Gem Material Assignment

The materials applied to the item during the Search phase of the design consultation are carried through to the Customize and Order phase. However, if you would like to review and change a material applied to an object - for example, if you need to change the rings overall appearance from Platinum to White Gold - look to the menu along the right side of the interface.



Similar to the method used in Search, click on the thumbnail images for Primary Metal, Secondary Metal, Center Stones, Side Stones *and* Accent Stones to assign a new material. The change is immediately reflected on the model.

Any Gem, Any Color

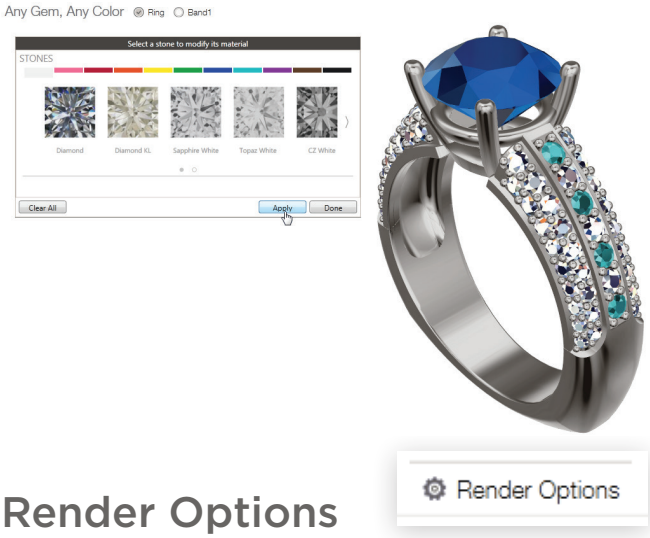
If the controls available do not allow you to reflect the gemstone in the material you prefer, look to the Any Gem, Any Color menu located at the bottom-right of the interface.



Click Any Gem,Any Color to open a menu where you can assign materials to gems individually. The interface will change, removing the stack controls and Render controls. A gemstone material assignment menu appears.

Within this interface gemstones on the screen become active and you have the ability to select and highlight

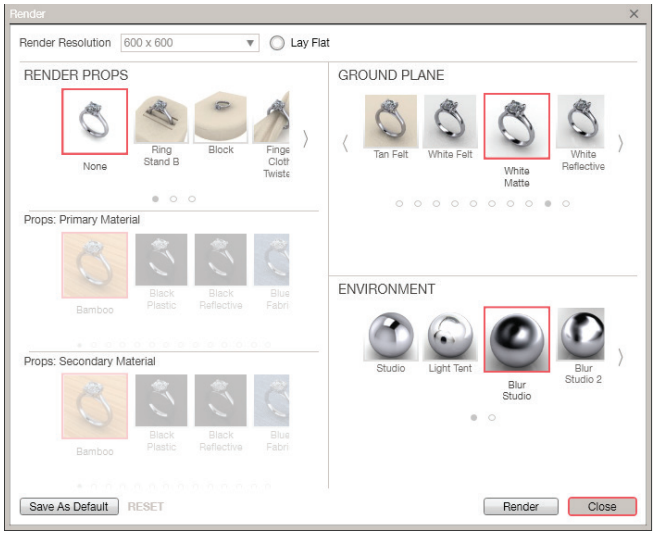
any gemstone isolating it from the rest of the group. To do so, hover your mouse over the gemstone you wish to change and it will highlight. After determining the appropriate gem is highlighted, click the gem and it will highlight darker. Continue selecting all the gems you wish to change to the the same new material. Within the material menu, choose the color and material you desire and click Apply. The gemstone(s) will immediately change to reflect this color, indicating the new material has been properly applied. Continue this process until you are satisfied with your choices. If at any time you wish to revert the changes, click Clear All. Otherwise, click Done to return to the SketchPad.





Render Options

The Render Options menu empowers you to add your personal flair to a Render. Choose the background (Ground Plane) and lighting (Environment) for the Render as well as the resolution for the final image. There are even props (Render Props) such as a ring box or a jewelry pedestal to add to the composition.



Click Render Options to open the menu and set the preferences for your composition. Choose Props and apply the Primary Material and Secondary Material for the object. At its default (None), a prop will not be included in the scene. If you prefer, toggle “On” the Lay Flat option and force your jewelry item to rotate so that it lays down flat on the Ground Plane or one of the Props you have chosen to include in the scene.

Next, choose the Ground Plane or the surface on which the jewelry item sits and what appears in the background. Ring items stand up on the Ground Plane unless the Lay Flat button is selected within Render Props.

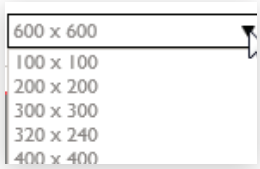


Lastly, choose the Environment. Think of a render as a photograph and think of the Environment as the setting and lighting where the picture was taken. The overall look of the picture changes depending on these things. Light is an important factor in the overall look of the render. Some Environments have spotlights, some have windows and others have both direct (spotlights) and indirect (windows) light sources. Experiment with different Environments to find a look that appeals to your aesthetic and works best with the piece.

Set Render Position

Rotate and zoom the jewelry item to an aesthetically-pleasing position that displays the models unique design elements. Keep in mind, Render will mirror this exact layout. If a Prop is included in the Render, zoom out to include it in the scene.

Resolution



Select the Resolution from the drop-down menu list located at the top of the Render Options menu. The higher the number, the larger the render and the longer it will take for your computer and the program to create it. Larger resolutions are appropriate for banners and posters, while smaller email better. The program defaults at 600 x 600 dpi. This size renders fairly quickly and presents well as a printout and emailed image. Experiment and find what's best for you and the job at hand.

When you are done assigning all the attributes, click the Render button located at the top-right-hand side of the interface, or from within the Render Options menu itself. The V-Ray frame buffer menu appears and the render is created from the top-down. It may take a few minutes to fully complete the render. Take note that the process tends to slow down around the gemstones. The more stones in the piece, the longer it may take. This is because the program must work out complex geometry to manifest light-reflecting gem facets.

When the render is complete, click the Save icon (computer disc), located along the top row of the V-Ray frame buffer menu. Choose the appropriate location on your computer to save the file. Type a name in the File Name text box and select JPEG from the Save as type drop-down list. Click Save. Use any printer utility to render for your client.



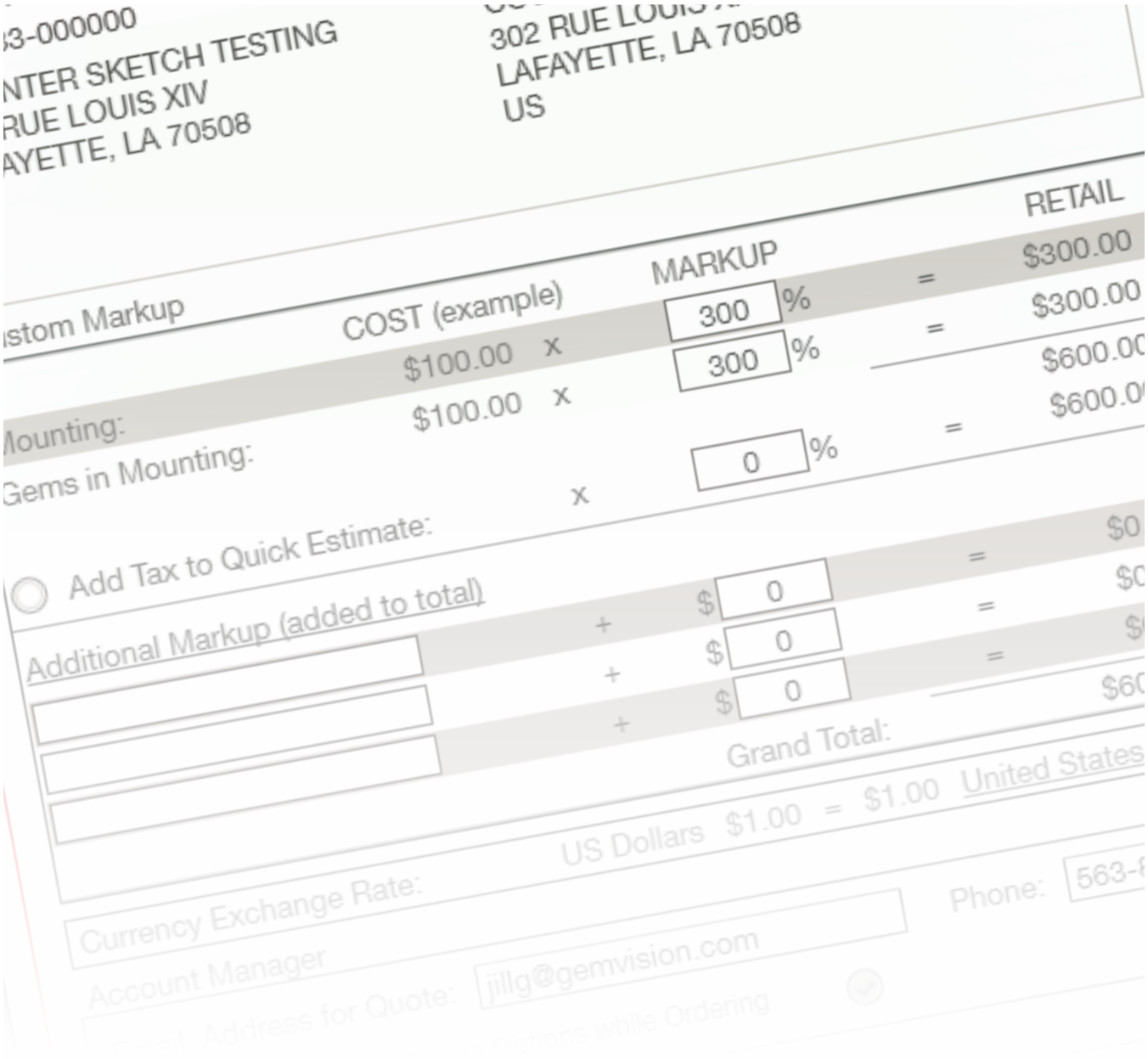
PRINTING RENDERS

You must save the file to a location on your computer before you can print the Render. If the file was saved as a .png, the background will disappear from the image. This can be useful when using the image for appraisals or other applications.

If you find Render settings that you are particularly drawn to and wish to repeat this look and feel, you can save the settings as the default look within the Render Options menu. To do so, enter into Render Options, make all of your Prop, Environment and Resolution choices and click the Set as Default button located in the bottom-left-hand corner of the menu. The next time you click Render, these options will automatically apply. If at any point in time you wish to remove the defaults, enter into the Render Options menu and choose Reset.

Free Advertising!

Emailing or printing Renders for your customers to keep only benefits you. They'll show friends and family their future piece of jewelry - *and* tell them all about the high-tech and personal customizing experience they had at your store!



CHAPTER 5

Account Info & Preferences

THE COUNTERSKETCH MENU



Located in the top-left corner of the interface, click the CounterSketch Studio button to reveal many helpful Utilities. (Located along the top of the interface in previous versions of the software). This button contains the following menus; New Session, Account Info, Preferences, Unregister, Import Design, Export Design, Import Part, Order History, Backup and Help. These important utilities allow you to set your Mark-ups, cater the look and feel of the CounterSketch Studio interface to your preference, as well as access some fundamental utilities that will assist you in management of your CounterSketch Users and Orders.

ACCOUNT INFO

Manage your account settings under the CounterSketch Menu located in the top-left-hand corner of the interface. After you have entered your Stuller credentials, the Account Info menu becomes accessible. Read more below for a complete breakdown of the options within this menu.

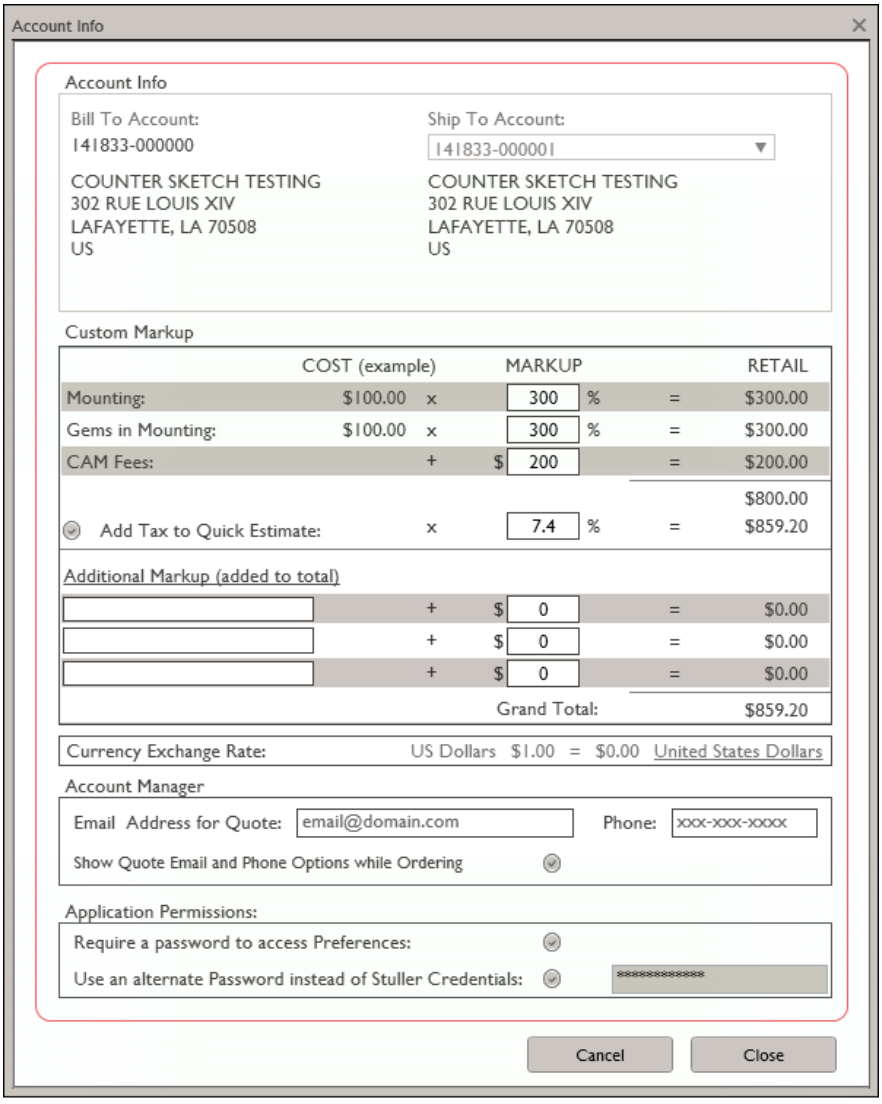
Account Info

Bill To Account/Ship to Account: displays your Bill to and Ship to account information. If your Stuller account has more than one store location, use the drop-down arrow and choose the appropriate Ship to address. In the event the account information is incorrect, please go to www.Stuller.com and update your account information.

Custom Markup

Next, customize the markup percentage for the Mounting, Gems in Mounting and CAM Fees within the Custom Markup category. The markup percentage is used when calculating a Quick Estimate (See the Quick Estimate section for more info). Notice the Cost column is multiplied by the Markup. In turn, the Retail column reflects the client's cost equivalent. After entering the desired markups, hit the Tab key, or Enter to see the Retail column update with your changes.

Mounting/Gems in Mounting: Enter the profit percentage for each of the categories. *Keep in mind 100 percent of $100 = $100*. Pay special attention to the Retail column and double-check the Markup percentages entered, making sure they reflect the intended total (when altering the numbers within the Markup column, Close out of the menu and re-enter it to see the Retail column update).



Add Tax to Quick Estimate: Toggle on Add Tax to Quick Estimate and enter the amount within the corresponding text box to have it included in the total. Be sure to include decimals.

Additional Markup: You are given 3 additional columns in which to add your own custom markups. Enter a short description in the text field and the dollar amount you wish to add to the total in the corresponding Markup column. Additional Markups created are automatically included in the Grand Total.

NEED A LOGIN?

The Bill to and Ship to sections - as well as access to the Account Info menu - require your Stuller credentials. If you do not have a Stuller account, click Need a Login? and sign-up for a Stuller wholesale account, or visit www.Stuller.com to register.

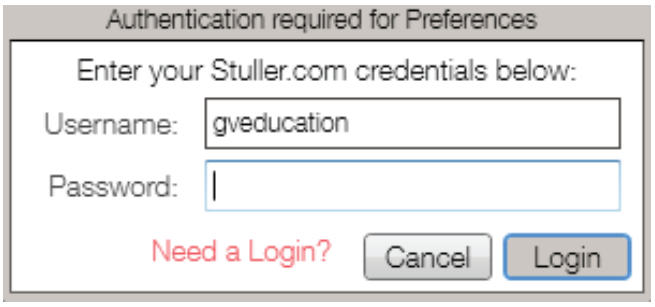
***NOTE:** Because the Account Info section allows control over the Markup percentage used when calculating estimates, be sure to complete this information prior to working in CounterSketch with a customer.*

Currency Exchange Rate

Glance here to see the current Exchange Rate between US Dollars and the currency that has been selected within Preferences as the default for the software (See the Preferences section). Click on the underlined currency to be taken directly to Preferences > Region Settings > Currency Settings in order to change it.

Account Manager

Input the Account Manager's email and phone number here, and Stuller will automatically include them



on *ALL* communication regarding an Order or Quote for your store (along with the User who placed the order).

Application Permissions

Require a password to access Preferences: The features available within the Preferences menu control the Display options as well as Regional settings and other important utilities. Do you prefer not to have the Preferences menu password protected? An option in the Account menu allows you to lift the password protection on the entire Preferences menu so that all its tabs can be accessed and modified by anyone within your store that uses CounterSketch.

Keep in mind, the Account Info menu and the proprietary information within (including where your Markups are determined and stored) will *always* remain password protected.

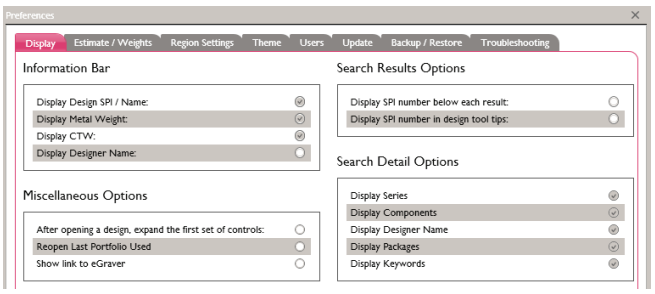
Use an alternate Password instead of Stuller Credentials: If you prefer not to have your Stuller Account be the universal password used to gain access to the Account Info and Preferences menus, the second toggle allows you to create and use an alternate password of your choice. When selected, a text box will appear. Enter the alternate password into the field.

Once you are satisfied with your updates to the Account Info menu, click Close to save them or hit Cancel to negate any changes made.

PREFERENCES

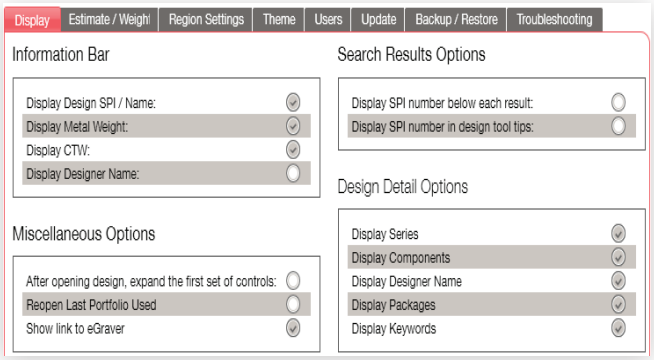


The options within the Preferences menu allow you to customize the look and functionality of your CounterSketch Studio interface to match the personality of your individual store. Locate Preferences under the CounterSketch Menu. The Preferences menu has been divided into eight separate sections (tabs): Display, Estimate/Weight, Region Settings, Theme, Users,Update, Backup/Restore and Troubleshooting.



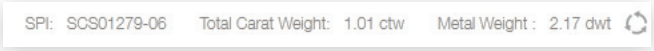
Display

The Display Options become available by clicking on the Preferences option within the CounterSketch Menu. Among other things, this section gives you display options connected to the Information Bar within the program as well as display options connected with each designs Sku, otherwise known as its SPI number. Access to this section of the program may require a password (depending on your settings within the Account Information section).



Information Bar

These options affect what information is displayed in the area below the SketchPad. A checkmark indicates that the selection will be displayed:



Display Design SPI/Name: This option displays the model's unique SPI number (sku) along the bottom of the SketchPad when activated.

Display Metal Weight: displays the estimated weight of the mounting in either Pennyweights or Grams (depending on the selections chosen in the Estimate/ Weights tab discussed later in this chapter).

Display CTW: is the estimated weight of the gemstones within the design. CounterSketch calculates the gems weight based on the specific gravity of an ideal cut diamond.

NOTE: *The Metal Weight Calculator defaults to display the estimated weight of the mount in 14K White Gold until you change it to the metal of your choice within the* ***CounterSketch Menu>Preferences > Region Settings****. All gem weights are calculated as ideal cut diamonds.*

Miscellaneous Options

After opening a design, expand the first set of controls: Enable this option to automatically expand the first set of Design Stack slider controls when a file is opened. If the option is in the "Off" position, upon opening the file the Design Stack menu will be rolled up.

Reopen Last Portfolio Used: If this option is toggled 'On' and CounterSketch is shut down, the last Portfolio used before closing will automatically load when the program is re-opened.

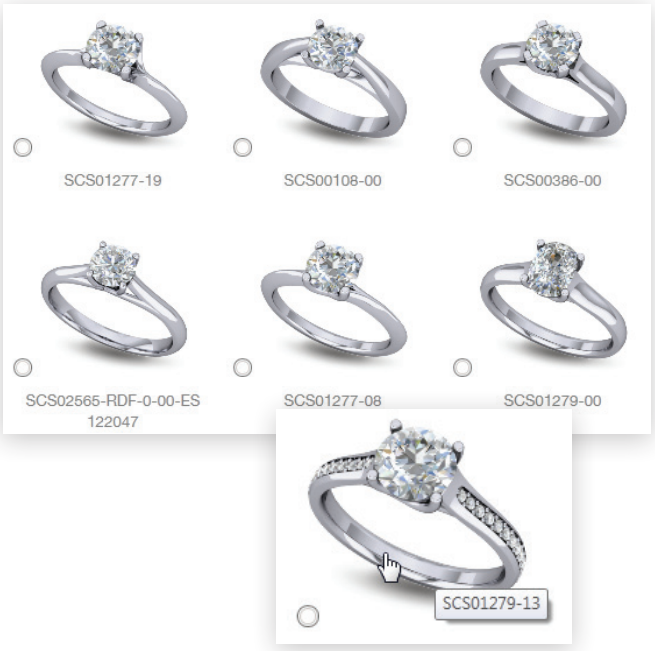
Show Link to eGraver: If you have an eGraver account with Stuller, selecting this will add a link to the site at the top-right-hand corner of the interface. Contact Stuller for more information about this fantastic resource.

Search Results Options

Display SPI model number below search results: places a small sku number below each thumbnail image in the Search Showcase.

Display SPI model number in design Tool Tips: allows SPI model numbers to appear as a Tool Tip when your mouse is located over the thumbnail image in the Search Showcase.

Note: Each design within Countersketch is assigned a SPI number(sku) and if the item is stocked through Stuller it is also assigned a Series number. Both numbers can be used within CounterSketch keyword search. If available, the Series number is located within the Design Details Section of the Search interface and can be used to locate an item on Stuller.com.



Design Detail Options

These options affect what information is displayed in the Design Detail below the Similar Styles section within Search.

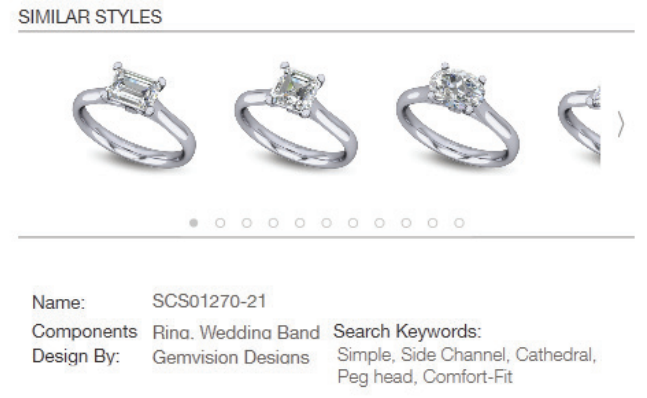
Display Series: includes the Stuller series number so the design can be cross referenced on Stuller.com

Display Components: displays all the jewelry items associated with the current design. For example if a matching wedding band is included.

Display Designer Name: displays the original designer. Enter the artists name into the keyword search to display their designs.

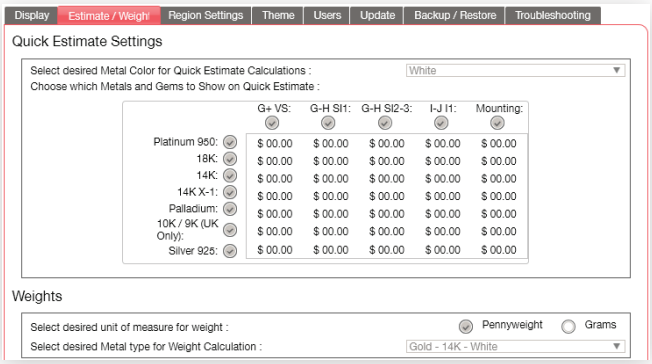
Display Packages: includes the prototype selling kits in which the model is included.

Display Keywords: displays the keyword attributes assigned to the model.



Estimate/Weights

This tab allows you to customize and control what is calculated in the Quick Estimate feature (covered next) - from metals, to diamond grades - and whether or not to include the mounting. The Weights section



corresponds to the Metal Weight field that appears below the SketchPad when you are working within the Customize Tab.

Quick Estimate Settings

Select desired Metal Color for Quick Estimate Calculations: Choose White or Yellow.

Choose which Metals and Gems to Show on Quick Estimate: Determine which metals, gems and corresponding prices are listed on the Quick Estimate menu when it loads. Opt to have them all appear, or choose to be more selective with what is viewed by simply toggling the associated buttons “On” and “Off”.

Weights

Located on the bottom-right just below the SketchPad, click the update icon to view the current Metal Weight and Carat Weight. Keep an eye on the details without having to open the Quick Estimate.



Select desired unit of measure for weight: Choose Pennyweight or Grams.

Select desired Metal type for Weight Calculation: Within the drop-down, select from a variety of metal types and karats. Are a majority of your sales in white gold of a certain karat? Have this reflect accordingly.

QUICK ESTIMATE

When it’s time for you and your customer to address cost and are ready for an estimate, look for the calculator icon displayed in the bottom-right corner of the interface while working in Customize, Freehand and Order. Quick Estimate will display the pricing information for all designs in CounterSketch’s virtual inventory based on the current price of metals in the market that day. Note that you will need an *active* connection to the internet to retrieve this information. Also keep in mind that any gem *4mm or larger* on the piece will not be included in the estimate due to dramatic price fluctuations inherent between gems of this size. In CounterSketch, gemstones of this size are considered Large Gems and all smaller gems are considered Accent Gems. Be sure to visit Account Info under the CounterSketch Menu (CounterSketch icon located in the top-left corner) to enter your markups prior to giving an estimate.

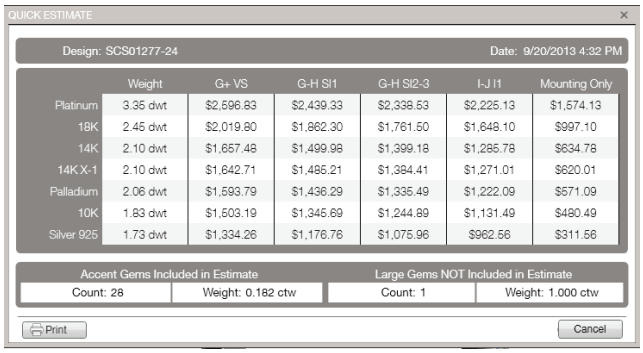
NOTE: *BEFORE using the Quick Estimate feature in front of a customer, visit* ***Account Info*** *under the CounterSketch Menu to apply your Markup percent-*

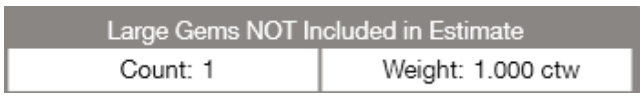
ages. Refer to the Account Info section for more information. If your markup is not entered prior to placing a Quick Estimate, the information retrieved will reflect wholesale pricing with absolutely NO markup applied. Add Tax to your estimate by selecting ***Add Tax to Quick Estimate****.*

With the chosen ring design displayed on the Sketch-Pad, click on Quick Estimate located in the bottom-right corner (calculator icon).

Soon the Quick Estimate menu will expand, displaying a breakdown of the metal selections you edited within CounterSketch Menu > Preferences > Estimate/Weights (see above) their cost as the mounting, and their corresponding weight. Also displayed is as a range of three different melee grade costs (if applicable). At the bottom of the menu the Accent Gems included in Estimate and Large Gems NOT included in Estimate are both broken down by weight and count. As stated before, Large Gems are stones 4mm or larger. Smaller stones are considered Accent Gems.

NOTE: *All gem weights are calculated as ideal cut diamonds. Pay attention to which gems are included and excluded in the Quick Estimate by looking at the bottom of the menu.*





This is the point in time to proceed in closing the sale! In the event the mounting is still out of the customer's price range, try making a few adjustments to bring the cost down in price. Would they opt for a lower karat in the same metal or be happy with a different metal type altogether- maybe White Gold instead of Platinum? If these are not viable options, consider decreasing the gem size or quality, decreasing the width of the shank or try hollowing the design. For some tips on how to hollow a ring, refer to the Customize chapter and see the section on Editing Profiles. Upon closing the sale, your next step is ordering the item from within the CounterSketch interface.

Region Settings

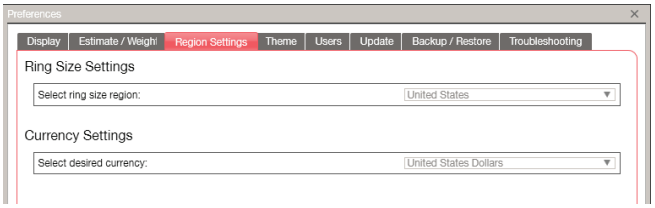
The Region Settings tab customizes region-specific settings within CounterSketch.

Ring Size Settings

Select ring size region: Select the appropriate region for the ring size from the drop-down so that it is correct for your country when working with a customer.

Currency Settings

Select desired currency: Be sure to select the currency for your region here so that it is appropriate during a Quick Estimate.

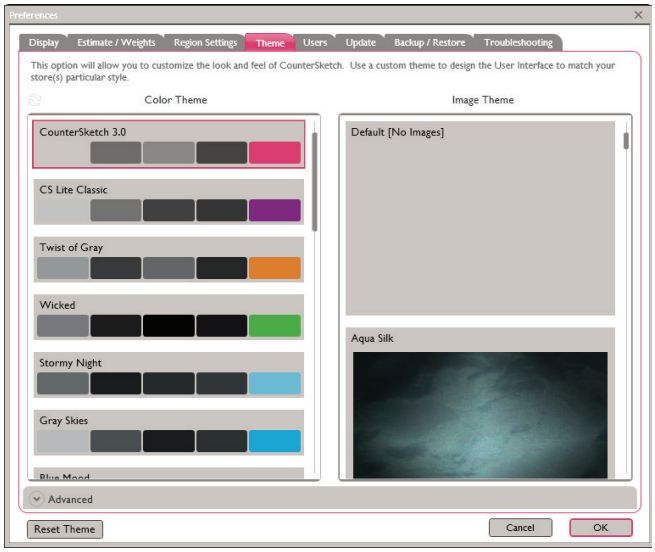


Theme

Individualize the CounterSketch Studio interface to reflect the special persona of your store. The Theme tab offers a wide range of customizing options. Choose one of our pre-created Color Themes or design your very own individualized color combination for your interface. Next, select a background Image Theme, upload your own background, or simply select a complimentary solid color for the background if you prefer.

Color Theme: A variety of pre-created Color Theme options are displayed on the left. Scroll through these options with the slider bar on the right and click on the theme of your choice. The new theme selected will automatically update onscreen. Keep trying on new color themes by selecting new options. Hit Cancel at the bottom of the menu at any time to revert back to the previous CounterSketch Studio theme saved, hit OK to apply the new choice. Note that the traditional CounterSketch Studio theme can be reselected at any time.

Image Theme: Instead of choosing a Viewport Background Color (see below), you also have the option to select an Image Theme that will appear behind the models on the Customize screen. The Image Themes available appear on the right side of the Theme tab. Scroll through and select from a variety of exciting styles. The look selected will update once you hit OK



at the bottom of the menu. Click Default[No Image], or Reset Theme at the bottom of the menu to return to the default white CounterSketch background. Keep in mind that Reset Theme will reset the entire interface back to the CounterSketch default.

Advanced

For even more control over the presentation options of your interface display, click on the Advanced tab located on the bottom-left of the Theme menu.

Create Custom Theme: Toggle on the button next to Create Custom Theme to make the interface color swatch appear. When clicking on the color swatch a rainbow color-picker menu opens beneath, allowing you to adjust the color for the entire theme. Left-click and drag the curser across the rainbow shading to select a pastel color. The selected shade will appear within the box on the right-hand side and represents the lightest color on the far left of the color swatch. Control the intensity of the color you are creating with the Saturation slider, and depending on the direction slid, Brightness adds either white or black to the tone. Clicking on the toggle next to Grayscale allows you to select from shades of grey. Explore different adjustments and see what you come up with. Hit Apply to see the updated results display within the interface or uncheck the toggle to revert back to the pre-created Color Theme you had selected at the top of the menu.

Import/Export: Located below the Custom Theme portion of the menu, these buttons make it easy to share the same Custom Theme across multiple computers, or to save your favorite themes for easy accessibility later. You can create as many themes as you want and switch between them with no guesswork about what colors were used. To save a Custom Theme, click Export, create or find a folder to save within that you can navigate easily to later, and click Save. When you decide to use the saved theme again, all you have to do is click Import and find the folder. The colors will load into the color swatches automatically. Click Apply to preview the color combination if desired.

Viewport Graphic: Prefer to have your own custom graphic display behind the Customize screen instead of one of the Image Themes we've created for you? Click on the field next to Viewport Graphic to import and upload any image of your own - from textures, a photograph, or perhaps your own logo. It's up to you! To remove it simply hit Reset.

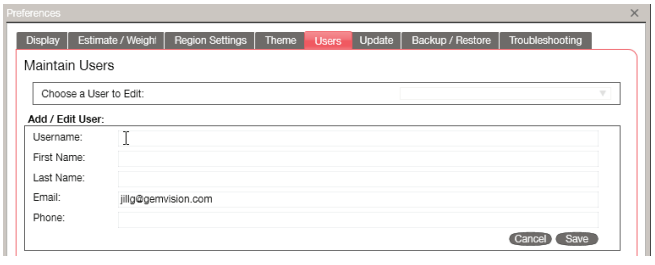
Viewport Background Color: Instead of choosing an Image Theme *(see previous)*, pick a custom color to compliment the custom logo applied as the Viewport Graphic, or if you have chosen not to add a Viewport Graphic, you can simply use this function to change the SketchPad to a solid color of your choice. Click Reset to undo.

***NOTE:** When choosing a Viewport Background Color, keep in mind that this option will not be viewable if you have selected an Image Theme other than the Default[No Images] option, or have a Viewport Graphic selected. Hit **Reset** next to the Viewport Graphic section to remove it if one is uploaded and make sure under Image Theme you have the Default[No Images] white background selected.*

Have you made many different changes to the interface and wish you could simply go back to the original CounterSketch Studio theme with one click? The Reset Theme button at the bottom-left-hand corner of the Theme menu automatically clears all selections made while in the Theme tab.

Users

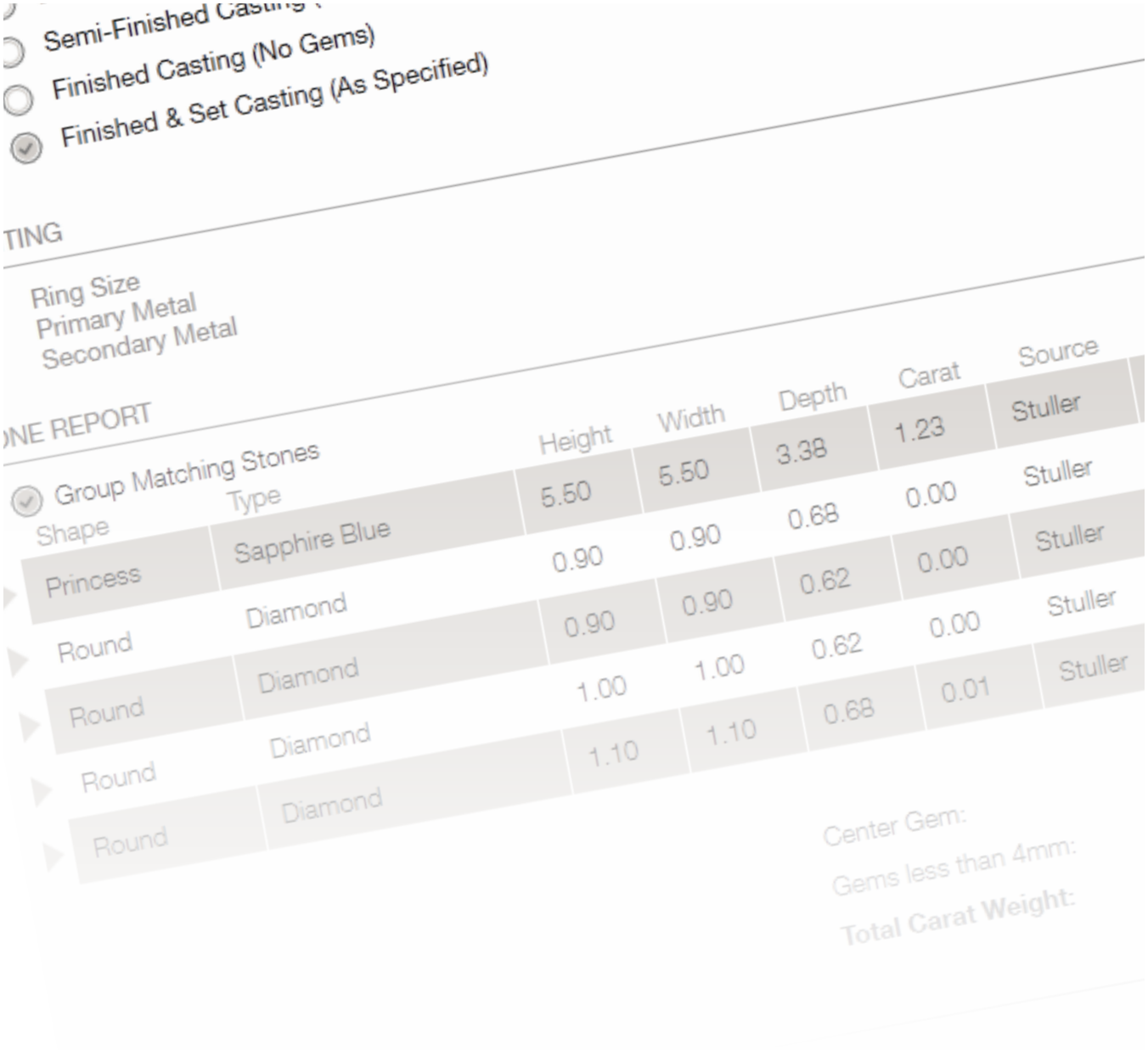
The Users tab is where you manage employees and personnel who will have access to CounterSketch. Anyone making sales with CounterSketch and sending orders to Stuller will need to be added to the program here.



Add: Create Users by clicking on the ***Add*** button. Enter the appropriate information within the Username, First and Last Name, Email, and Phone text boxes, then hit Save.

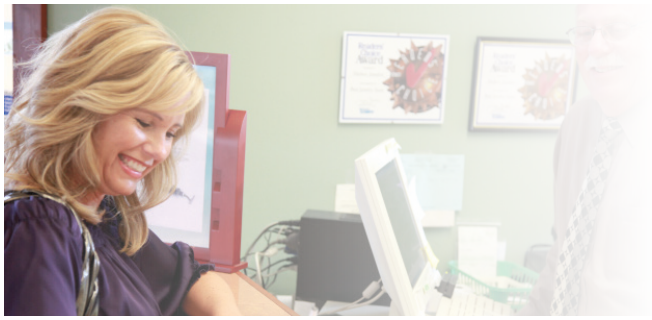
Choose a User to Edit: Edit or Delete users you've created by selecting the desired name from the drop-down window and performing the intended action. After editing an employee, be sure to hit Save to capture the revised data or hit Cancel to void the changes.

NOTE: *Additional functions are accessible within the* ***CounterSketch Menu > Preferences****, however they are more related to Utilities or Help. For more information please refer to the Utilities, Resources & Help chapter.*



CHAPTER 6

Order



SETTING UP YOUR ORDER

You have helped your customer select and customize their dream design. Now send the information to Stuller and close your CounterSketch Studio sale!

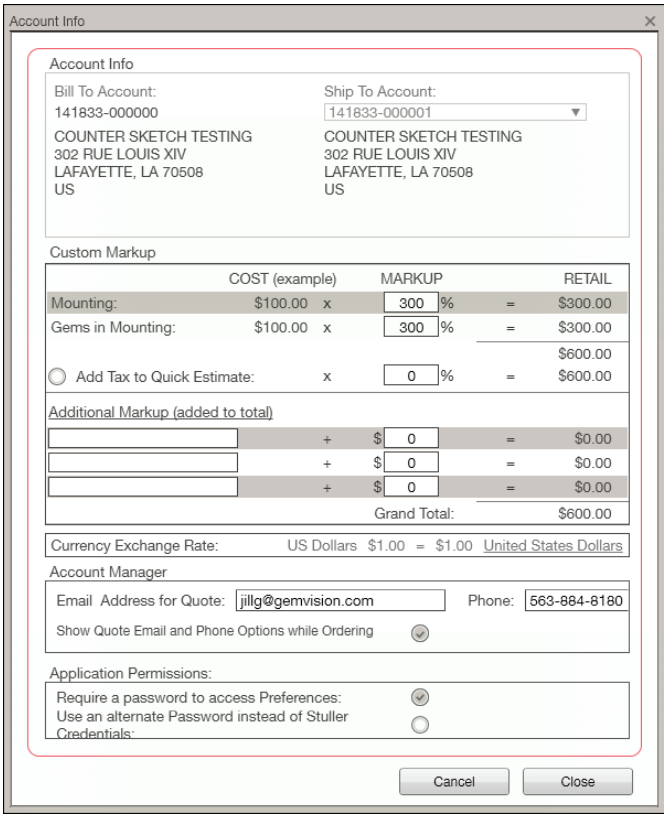
Order Your Designs From Stuller

Place an Order directly to Stuller from the CounterSketch Studio interface. Track this estimate within the CounterSketch Menu> Quote History. Specify the metal alloy and desired level of finish. Choose from Semi-Finish Casting, Finished Casting, or Finished & Set Casting. Order gems from Stuller or use your own gems to complete the design. You even have the option to hallmark your design and add custom engraving with or without a fill color! Once your order is processed, Stuller will email you a Quote Notification. Upon approval, your job will typically be completed in 8 days or less. Keep in mind, extra modifications and specialized setting of customer gems may extend the time frame required for manufacturing.

PLACING AN ORDER

Account Info

If the account information is already entered in Account Info within the CounterSketch menu(accessible by clicking on the CounterSketch icon in the top-left corner), you are ready to place an Order. For more information on Account Info refer to the Account Info & Preferences chapter.



NOTE: *Placing an order will NOT begin production of the item. Stuller will first provide you a firm estimate that requires your approval before proceeding.*

USER TIP

If you want more than one person to have visibility on all orders, it may be wise to use a distribution email address or an email address where all CounterSketch Studio users can access the correspondence.

NOTE: *When communicating, or if there are any questions about your order, Stuller will contact the User who placed the order and carbon-copy the 'Account Manager' on ALL correspondence.*

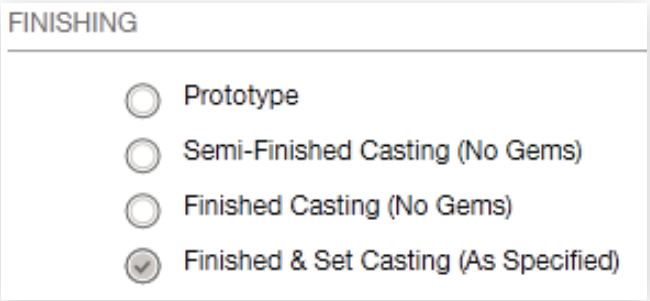
Reference # & Customer Info

In the top-right corder of the Order information, enter a Reference # for your records and fill out the customer information as needed. It is recommended to complete all of the customer information in its entirety. However, only the customer's first and last names are required to proceed. This information will auto-fill if you filled out the customer info within the Design Manager.

Enter any additional comments about the customer into the 'Order Comments' field. This information is used solely for your purposes and is not meant to be used as a notes field for Stuller.

Finishing

Next, choose the level of finish you desire. Choose Prototype to order a finished Prototype in 'brass and glass'. Prototypes allow you to build Collections within your store without the costly overhead of precious metals and gemstones. Prototypes are a great tool for helping the customer visualize and make design decisions during a consultation. Semi-Finish Casting (No Gems) provides you with a raw casting with no gems supplied or set. Finished Casting (No Gems) returns a polished mount also with no gems supplied or set. Finished & Set Casting (As Specified) returns a fully polished and set mount ready to hand to your customer.



Mounting

Ring Size

Review the Ring Size information. If you need to change the information simply return to Customize, make the change to the model and return to the Order screen.

Metal

Review the Primary Metal and Secondary Metal materials applied to the design. If you would like to alter your metal choice or alloy revisit the Materials menu located along the right of the interface and choose a new selection. *(See the Metal and Gem Material assignment section within the Appearance chapter.)*

Stone Report

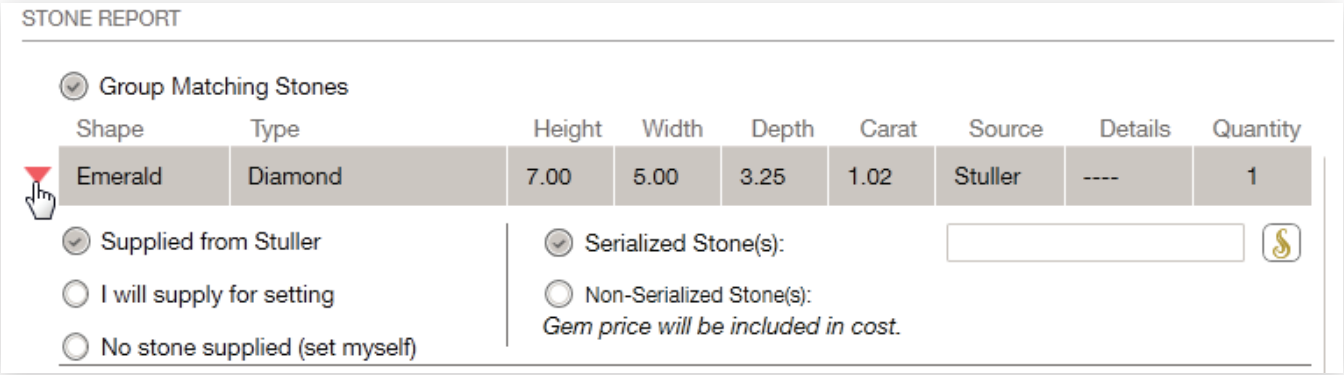
The Stone Report lists in detail the Shape, Type, Size (Height, Width, Depth, and Carat Weight), Source, Details and Quantity for every gemstone included in the design. The cumulative totals are located just below and detail the Weight and Quantity for the Center Gem.

USER TIP

Any gem 4mm or larger on the piece will not be included in a Quote or the Order due to dramatic price fluctuations inherent between gems of this size.

Click the arrow located to the left of each gem grouping and specify the source for each gemstone group and whether or not you will set the gemstones or rely on Stuller's master gem setters to complete your design. If you wish to see each gemstone individually and not as part of its matched group, toggle the Group Matching Stones 'Off'. (Some selections require Group Matching Gems toggled to the 'Off' position.) There are three options for each gem or gem grouping.

Supplied from Stuller: (not available in Grouped Mode) The Serialized Stone(s) option requires a Stuller Red Box or Black Box serial ID. Enter this information in the text box which becomes available when the option is toggled to the 'On' position. Use the Stuller icon to shop at www.Stuller.com When choosing a Red or Black Box Gemstone, the price of the gem will not be included in the final Order price. Entering this information allows Stuller to use the exact Gemstone measurements to ensure the gemstone will fit properly into the mounting while being set. Entering this information does NOT actually order the Gemstone from Stuller. You will need to use your regular method to Order the Gemstones.



NOTE: *A gem must be ordered through Stuller.com or by calling Stuller. Gemstones included in a CounterSketch Order are NOT placed on hold or Ordered.*

Non-Serialized Stone(s) require you to choose the Type, Quality and Color. Based upon the gemstone material assigned for each gem on the SketchPad, CounterSketch will cross reference Stuller's inventory of gemstones and list the Type, Quality and Color choices available.

NOTE: *Non-serialized gems list only gems available through www.Stuller.com. However, it is possible that a particular size is not available. If so, a Stuller CAM Services representative will contact you so you can decide how to proceed with the Order.*

I will supply for setting: For this option you will send your gem(s) to Stuller and have Stuller set the gem(s) for you.

Choosing this option gives access to the Type of Supplied Stone text box. Specify the type of gem, for example, diamond or ruby by typing into the text box. Below, enter the Value of the supplied Stone. The value is used to determine the setting charge and insurance value declared when shipping the item to your store.

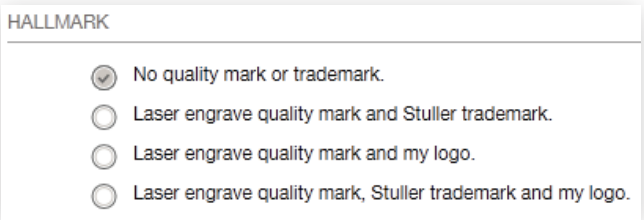
No stone supplied, set myself: This option needs little explanation. Take special care to verify the Height, Width and Depth fields to ensure your gemstone fits the manufactured mounting snugly and correctly.

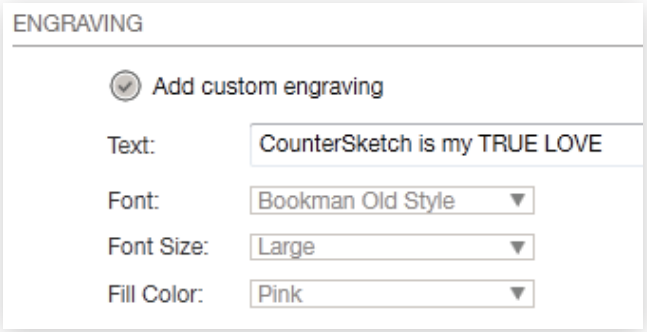
Hallmark

In addition to the options above, CounterSketch Studio also allows you to add a Hallmark to further personalize and brand your custom design. Opt to mark the design with the quality mark (for example 14K), Stuller logo, or your own logo. Or choose a combination or any of the three options.

Choose from the following options: No quality mark or trademark, Laser engrave a quality mark and Stuller trademark, Laser engrave quality mark and my logo, or opt for all three and choose Laser engrave quality mark, Stuller trademark and my logo.

Submit your logo to camservices@stuller.com and Stuller will keep the logo on file for your future use.





Engraving

Add Custom Engraving is typically used to personalize the item for your end customer. If custom engraving is desired, toggle this option on to see it's sub-options. Enter your customer's special message into the text box. Keep in mind the amount of space for the engraving. Next, choose the desired font and font size. The font style selections made in the drop-down will update immediately within the text box to help your customer visualize their options. Choose from Bookman Old Style, Colonna MT, Edwardian Script ITC, Old English Text MT, Script MT Bold or Lucida Handwriting.

Select ***Fill*** to add color and contrast to the engraving. Choose from black, blue, brown, green, pink or red. If no fill color is desired, leave the Fill option unselected.

Engagement Rings

If the order is a matching band for an engagement ring that has been previously produced, be sure to toggle this option to ensure the two bands correctly match each other. Stuller's CAM department strongly recommends sending the engagement ring along with the order to ensure your satisfaction. Check whether or not you agree or refuse to send in the ring. If the latter is the case, check the box stating that you understand that Stuller cannot guarantee a perfect match without the ring as a guide.

Additional Design Notes

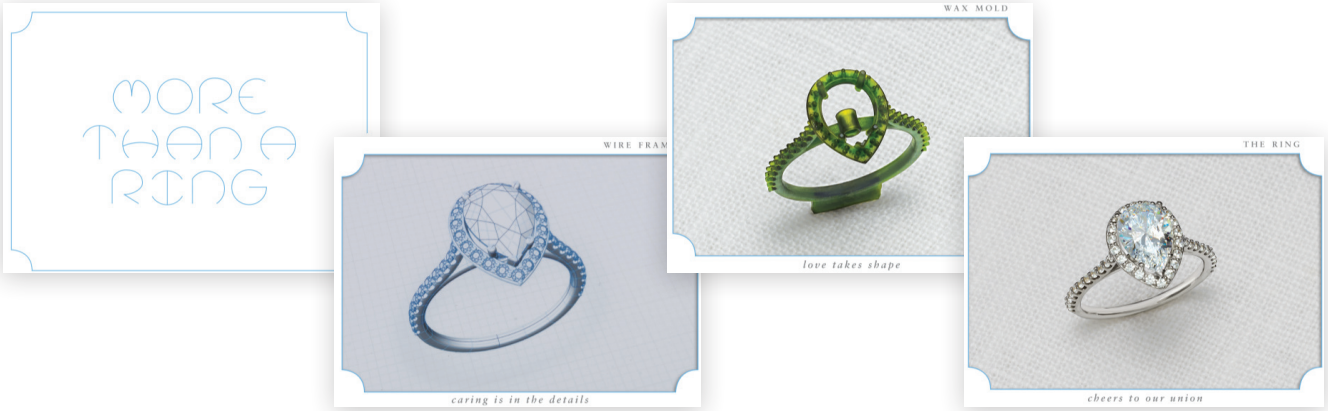
The Additional Design Notes tab is supplied to communicate any special instructions you wish to relay to Stuller about the order. Click on the button and type the full instructions into the text box. Adding Additional Design Notes could delay the quote process 1-3 days.

USER TIP

Be aware that adding special requests and notes can delay the time in which the Order Quote is processed up to 72 hours.

More Than A Ring

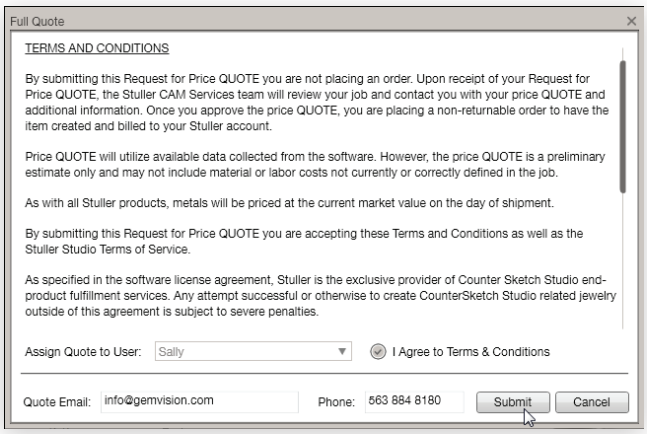
You've taken the time to get to know your customer and design a ring they will love. Set your store apart from others by delivering More Than a Ring. This look book details the journey of your customer's ring from its beginning as a CAD rendering, to the wax model, then the raw casting, and finally... the finished piece in all its glory. Sure to be a cherished possession, the book has a place for a photo of the newly-engaged couple and a holder for your business card. Give the gift that tells the story of how a couple's engagement mirrors the journey of their love with this beautiful keepsake. Click View Book Example to help visualize the finished book.



SUBMITTING YOUR ORDER

When all the information has been entered and you are ready for Stuller to process the order and return finalized pricing for the item use the Get Quote button.

Use the drop-down window to assign the quote notification to the sales staff member (User) associated with the order. The Account Manager will automatically be included in the quote notification as well.



After doing so, the Order information will be sent electronically to Stuller and once Stuller receives your Order, you will receive a message stating 'Quote Sent Successfully'. If you do not receive this message you may have an internet connection issue and Stuller may not have received the file.

Quote History

After submitting the Order, it is automatically logged into the Quote History portion of the program (found under the CounterSketch menu (icon in the top-left corner).

Located at the top-right of the Quote History menu a drop-down menu list includes each user that has been added to the User list within CounterSketch Menu > Preferences > Users. Choose All Users to see all Orders placed under your CounterSketch Account.

Each Order tracks the User, as well as the date and time the Order was submitted, and the Reference Number (if you included this information).

Revisit any design documented in the Quote History menu by double-clicking on the corresponding thumbnail image. The design will load onto the SketchPad. If you would like to see any order details simply revisit the Order tab while the item is open on the SketchPad. This is a simple way to review any customer information or manufacturing details of an item you ordered within CounterSketch Studio.

Conveniently displayed separately within Quote History, there is also a Prototype Orders tab that displays all of your prototype orders for easy reference.



CHAPTER 7

Deliver



From Stuller to You!

Focus your attention on custom-creative designs and the enhanced profits they provide. CounterSketch Studio delivers custom designs and higher profits to your store with quick turnaround times. Rely on Stuller and take the guesswork and overhead expense out of manufacturing. With Stuller reliability you get exactly what you need, on time, every time.

QUOTE CONFIRMATION

Within a few minutes, a confirmation email is sent to the CounterSketch User's email address supplied during the Order process. The subject line of the email will include the Reference ID number and the body of the email will include a brief description of the Order. The Account Manager assigned in the Account Info section of the interface will automatically be carbon copied on this correspondence. To assign the Account Manager information, look in the CounterSketch Menu by clicking the CounterSketch icon in the top-left corner of the interface and choose Account Info.

File Validation

Once Stuller receives the file, the first step is file validation. Stuller does this to be sure there are no subsequent problems during the manufacturing process. During the validation process, Stuller may make a few changes to some of the parameters to ensure manufacturing ease. Changes made may include increasing the prong size, increasing the thickness of channel rails or lengthening the prongs for setting purposes. All of the changes will result in an item which aesthetically matches the item you ordered, while also meeting necessary manufacturing requirements for strength.

STULLER CAM SERVICES

Creates a 3D virtual computer file of your design that Stuller will use to produce the item, using their impressive CAM capability transforming that model into reality in 8 days or less.

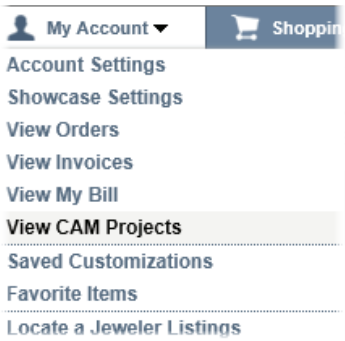
If the item cannot be customized to meet your exact design needs, and you have added 'Additional Design Notes' with special requests for the model, Stuller will try to work with you to solve the design dilemma.

The model validation process happens within one business day of placing the order. (Please allow up to 72 hours if Additional Design Notes are included).

After the file is validated, a Quote Notification will be communicated to you via email. This email notification will include a link to the CAM Services section of the Stuller website. There you can manage and track all of the jobs submitted to the CAM Services department at Stuller.

Approving and Tracking Orders

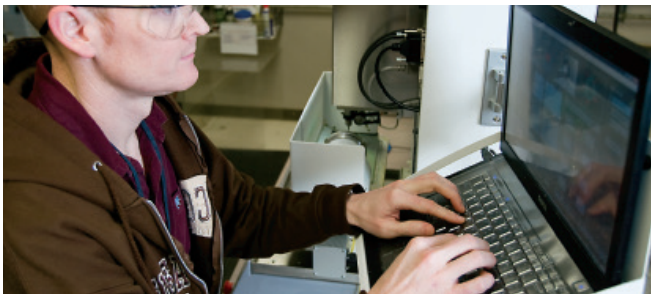
Choose to either follow the link in the Quote Notification email or visit www.Stuller.com to view and track all submitted orders.

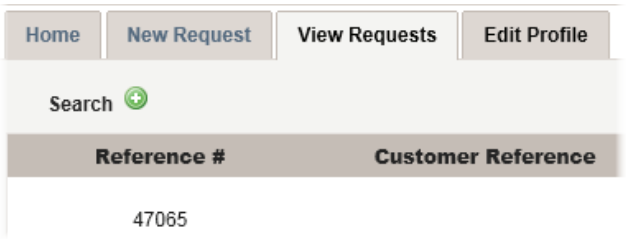


Stuller.com

Log in to your account using your Stuller credentials. If you choose to follow the link, you are automatically directed to the CAM Services section of the website. If you are navigating the site independently, click Customization located at the top of the site and select CAM Services.

The CAM Services section of the website is comprised of four tabs; Home, New Request, View Requests and Edit Profile. These different areas of the site are used to approve and manage all aspects of your CounterSketch jobs and any additional CAM Services jobs that are in process.





Updating Your Stuller Account

Manage your account information through the Edit Profile tab. Here your name, phone number, email address and account information can be reviewed. If you enable the "Yes, email me status updates", you will receive email status updates notifying you which steps of the manufacturing process are complete. You can also track the progress of your job step by step. The status updates are as follows: Request Received/ Validating File, Quoted(Awaiting Approval), Quote Accepted, Order Placed, Fabrication- Wax/Resin, Production-Spruing/Casting, Production- Clip and Ship/Semi Polished, Production- Polished/Setting, Memo Review, or Shipped.

If you do *not* opt for email verification, you will *only* receive the Quote Notification and an email indicating when the item has Shipped.

Tracking Your Jobs

Click on the View Requests tab to manage and track a job through the entire manufacturing process. If you have multiple jobs in process, you can view each individual job at a glance. The Reference Number, Customer Reference, Status and Request Date of each job are displayed.

To view specific information pertaining to a job, click Details (located on the far right). If the status of a job is currently set to Quoted (Awaiting Approval), the itemized cost will display and you will have the option to Accept the quote or Cancel the job. After accepting the job, click Submit to begin the manufacturing process.

THE CAM PROCESS

Among other factors, CAM pricing is dependant upon the number of 'parts', or separate cast pieces necessary in the production process (Ex: A two-tone piece vs. a piece consisting of only one metal type), Once the prototype is created, the item is cleaned and a

Submitting Gemstones

If you chose "I will supply for setting" to Stuller when using the Order function within CounterSketch, print and include the *'Stuller Stone Submission Form'* for Customer-Owned Stones you are submitting to Stuller to set.. This form will require you to provide information about the gemstones you will be shipping to Stuller including the quantity of gemstones, type of gems, size, quality and declared value. You will also receive the '*Stuller Studio Terms of Service Agreement*'. Please read this information carefully and include the signed agreement with the shipment of gemstones. The address for where to ship your gems is included on the submission form.

Once received, your gemstones will go through a quality assurance verification process to ensure the gem descriptions match the actual quantity, quality, size and value declared on the submission form. The gemstones will be paired with your order and Stuller will ensure the gems will fit securely within the constraints of the design.

NOTE: *Stuller is not liable for stone breakage.*

STULLER'S PROCESS

When a new request and CAD file is received, it's added to the queue so that its progress can be monitored.

The CAD file is validated to be sure there will be no production problems, and a cost estimate is sent to the customer. If approved, the file moves to fabrication.

A model will be produced using a variety of 3D printing technologies or by computer-aided milling (whichever is most appropriate for that specific design).

Once cast, the new piece of custom jewelry is polished and set, photographed for our archives, and the finished jewelry is shipped to the delighted customer.

If your customer chose the 'More than a Ring' option, the entire process is documented for their memory book, which will arrive along with the finished design.



sprue is added for casting. After it is cast, the model will enter the finishing stage.

Next, Stuller will finish the item to the degree of completion you requested during the Order process. Whether it is a gemstone you supplied or a gem you ordered direct from Stuller, Stuller's master stone setters will take great care during this process.

When the manufacturing process is complete, the item is shipped to the location provided in the Account Info section of CounterSketch.

NOTE: *Keep in mind that the cost of the item is determined by the price of gold on the day the item ships.*

DELIVERY

Expect delivery of your custom design in 4 to 7 business days after you approve your project (for US orders). The best part about it, you don't have any of the manufacturing concerns, yet you get to take all the credit!

TURNAROUND TIME

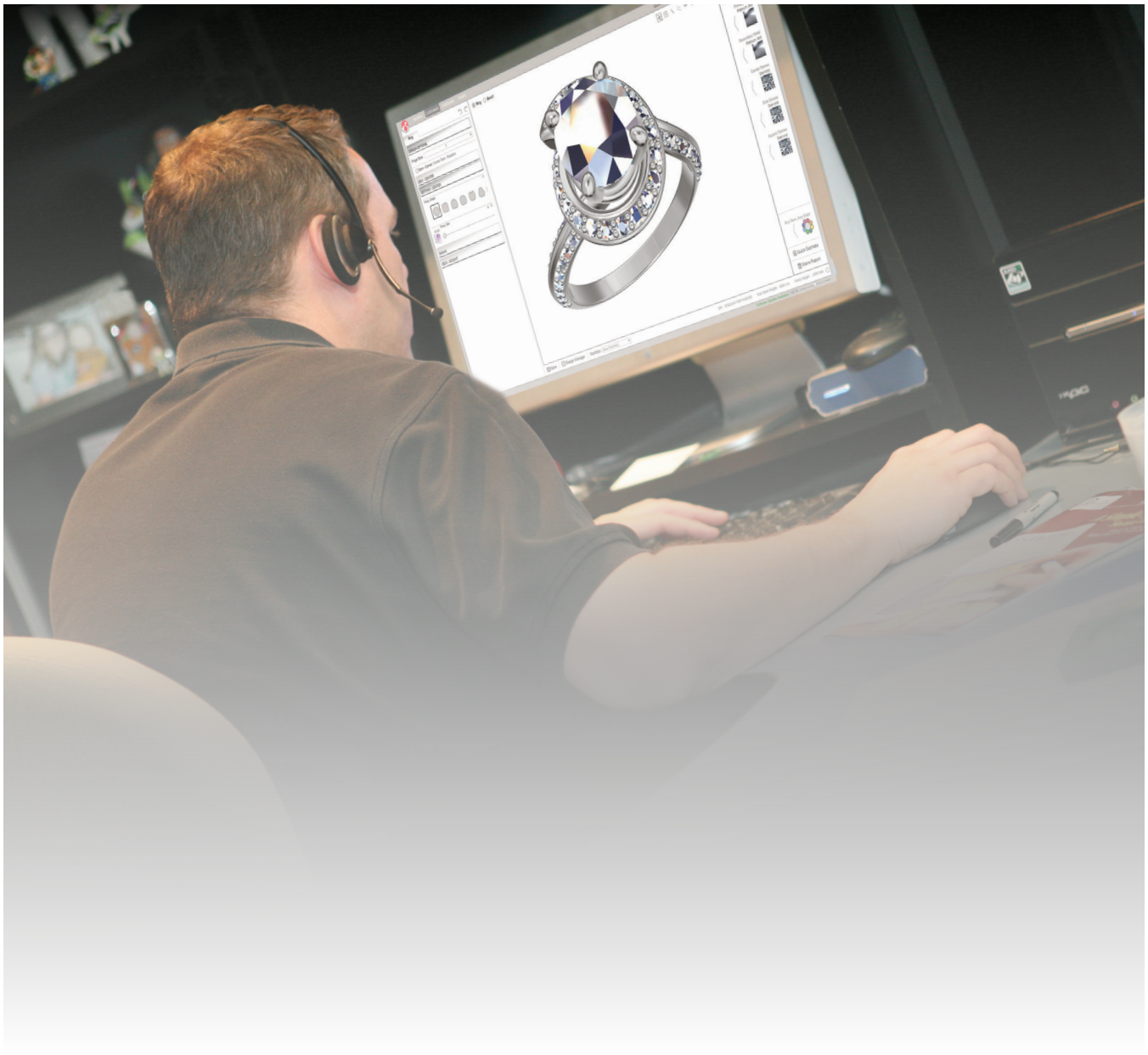
Our goal is to have your Order quoted within 24 hours of receiving the request during normal business hours (Monday-Friday 9AM to 5PM).

Adding special requests and notes can delay the time in which the Order Quote is processed up to 72 hours.

Manufacturing turnaround times are dependant on the level of finished desired and will begin the day after you approve the project.

Semi-Finished Casting (clip and tumble)	*4 days*
Finished Casting (polished)	*5 days*
Finished & Set Casting	*7 days*

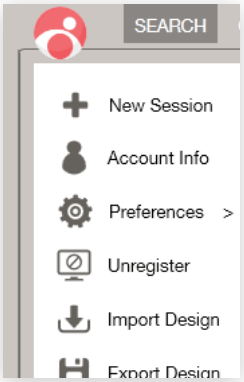
NOTE: *All time frames are calculated Monday-Friday 9AM-5PM. Please allow extra time if submitting gemstones.*



CHAPTER 8

Help & Resources

UTILITIES



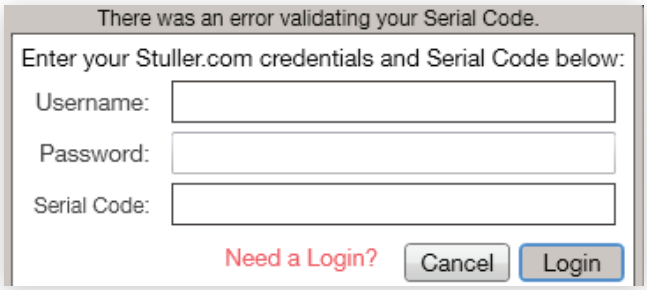
Located in the top-left corner of the interface, click the CounterSketch Studio icon to reveal many helpful Utilities (located along the top of the interface in previous versions of the software). Although most of the items within this menu have been discussed in previous chapters, there are a few helpful utilities that will be discussed in this chapter.

License Transfer

Want to spend some time learning and practicing CounterSketch Studio after business hours? Need to prepare for an upcoming design consultation and wish you could work from your home PC? Unregister your CounterSketch Studio license quickly and easily and transfer the license from one computer to another as often as you like. Follow these simple steps and walk the path to CounterSketch Studio freedom!

Install CounterSketch Studio onto the desired computer(s) using your original CounterSketch Studio install disc. Details for the install process are included on the installation disc. In order to move your license to a new machine, you will first need to unregister the old computer. To do this go to the CounterSketch Menu> Unregister. Read the dialog that appears. Clicking Yes will unregister the machine and automatically close CounterSketch Studio. Now you are ready to move your license.

When opening CounterSketch Studio on the new computer you will receive a prompt to enter your 16-digit license key, Stuller.com login and Stuller.com password, so remember to keep this information handy. The first time you open CounterSketch Studio on the new machine you will be prompted to set up your Account Information again including your Mark-ups. Enter your information in the appropriate fields and you're ready to go!



LICENSE TRANSFER CHECKLIST

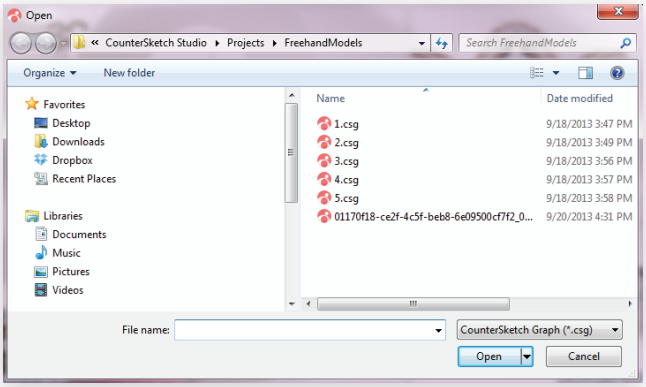
- CounterSketch Studio Install Disc
- 16 digit license key (Your 16 digit code appears as a sticker within the CounterSketch Studio CD case).
- Stuller.com login
- Stuller.com password

NOTE: *Remember, CounterSketch Studio will only be usable on one computer per license at a time and will always need to be unregistered from the first computer before you are able to use it on the new machine. Don't forget to unregister before leaving work if you plan on using the program at home or vice versa!*

Import/Export

In the event you contact Technical Support and need to send them a file or you need to load a file into CounterSketch Studio that was sent to you, use the Import/Export Design feature. Located within the CounterSketch Menu, choose to either Import or Export a Design.

Load a .csg file into CounterSketch Studio by clicking Import. Browse to the location on your computer where the file is saved and click Open. Take note, importing a file will override any file that is currently active on the SketchPad. If you wish to save this file, make sure to Save the active design prior to using the Import function.



Any design that is currently loaded onto the Sketch-Pad can be exported and saved to your computer. To do so, choose the Export option. A new window will appear. Navigate to the location on your computer where you would like to store the file. In the File Name text box enter the desired name and click Save. The file is now saved to the location you choose with a .csg file extension.

Update

The Update tab provides easy methods for keeping the software current. Update Settings are located within the CounterSketch Menu>Preferences>Update Settings.

Design Library: Ignore this button unless Gemvision has sent you a DVD in the mail of new designs to add to your CounterSketch Studio inventory. If so, mport the new designs by inserting the DVD and clicking the Import Designs button. Once complete, a window will indicate the number of designs before and after the import. Click OK to close the dialog box.

Demos: Demo Portfolios have been created for use at our Gemvision Academy for training purposes. Those Portfolios have been included for download in the software. Click the Download button to get the demos.

CounterSketch Application Update Mode

The CounterSketch Application Update Mode has two different options: Automatic and Manual. Counter-Sketch makes use of a Microsoft Technology known as Background Intelligent Transfer Service (BITS), to download all of its updates. This same technology is used to update Windows and to transfer files within Live/MSN Messenger clients.

BITS uses bandwidth that is not currently being used by your computer to transfer the data. When an update is downloaded, BITS works in the background outside of the CounterSketch environment. Begin an update within CounterSketch and it will continue until the transfer is complete, even if you choose to close the CounterSketch program. If you feel the need to surf the web, BITS will automatically reduce its bandwidth usage related to the CounterSketch update accordingly so you will not even notice your computer is working on the update. Now isn't that high-tech!

BITS only works on Windows platforms and requires the user to have the BITS service enabled. Your computer should already have this function enabled by default.

Automatic: The Automatic option will prompt your computer to routinely check if an update is available without you having to prompt the program to do so. If one is available, a green Software Update Available button will appear in the status bar (below the Sketchpad). Simply click on it every time you see it to keep the program current. This is the setting that we highly recommend.

NOTE: *While downloading an update a small green arrow will animate in the bottom-right corner of the interface.*





Manual: If you would prefer to control when the Software Update Available button appears, toggle on the Manual option. When the Update All button changes from being greyed-out, to being active, an update is available. Click on it to obtain the newest version. The program will begin the download and once complete, the Software Update Available button will appear (as stated previously in Automatic).

For convenience, also notice that under the Counter-Sketch Application Update Mode section, Your Version that you are working with - as well as the Latest Version available - are both displayed here.

Help Improve CounterSketch: The final option within the Update tab is to Help Improve CounterSketch. This option compiles data from the Search feature as well as how you use other areas of the application. If you choose to leave this box checked, all information gathered is merely collected for statistics and remains anonymous. This research information is invaluable in helping to improve CounterSketch and in giving you more of what you love and use most!

Backup Settings & Restore

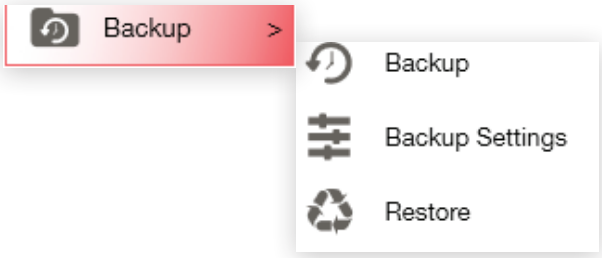
In the event you have hard drive failure or your CounterSketch Studio computer needs to go into the shop, you can restore your CounterSketch Studio files onto another computer and get up and running with CounterSketch Studio in no time with no loss of data by creating a copy or backup of CounterSketch Studio. Give yourself peace of mind and get in the habit of creating regular Backups.

The Backup feature will save your Order History, Catalog History, Preferences, and Customer Portfolios (Including your customer's personal information) – Basically everything of importance that you need.

To perform a manual backup, navigate to the CounterSketch Menu (icon in the upper-left corner of the interface). Choose Backup> Backup Settings. Depending on your Account Info settings, you may be prompted to enter your password.

Specify where you would like to store the backup file within the Backup Directory Location text field by clicking Browse. Be sure to save to an external location instead of your hard drive. Select the folder you wish to save your data in, or click Make New Folder to create a new one. Name the new folder and click OK. Next, click on Create Backup. Underneath the Backup Log, CounterSketch Studio will fill you in on what's happening during the process. This backup information takes up a lot of hard drive space. We advise that you only keep the most recent two or three backups and delete the rest in order to save space on your computer.

In the future, simply click Backup from within the CounterSketch Menu, choose the Backup sub option and CounterSketch Studio will automatically send the data to this location. At any time you may change the destination by clicking Browse again and specifying a new location or folder. Clicking Reset will clear the text field entirely.



BACKUP

Backup is just a way to access the Backup feature *without entering the Preferences menu. Access it quickly and easily by going to the CounterSketch Menu > Backup> Backup. The Backup will automatically be saved to your predefined location.*

***NOTE:** Performing a* Backup or a Quick Backup *can take 8-10 minutes or longer depending on your computer's processor speed. Plan ahead and perform them when your computer is not in use.*

Restore

After creating a Backup, the Restore feature can be used. Use this button if you ever need to Restore the program to the point in time when the last Backup was conducted. Click Browse to navigate to the folder where you previously created your CounterSketch Studio data Backup. Once selected, click Restore. As an added safety net, CounterSketch will ask if you want to perform a backup of the current CounterSketch Studio data before performing the Restore.

***NOTE:** Using the Restore feature to restore from a previous Backup point can potentially DELETE projects that were created after the date of the restored backup. Please use caution and ONLY use Restore when absolutely necessary. Also be advised, the Restore process may take a long time depending on the size and amount of Portfolios being restored.*

HELP MENU

Within the CounterSketch Menu, choose Help to view all of the resources available to you as a CounterSketch Studio member. If you have questions on how to become a member or what these member benefits are, contact Gemvision for more information.

User Guide

A digital copy of the CounterSketch User Guide is available online and can also be accessed within the CounterSketch program under Help (The first option in the list is User Guide). Choose this option to launch the internet and view the guide.

USER GUIDE

The User Guide *is hosted online and therefore an internet connection is required to view the file. If you wish to view the file offline, simply save the file to a location on your computers hard drive. Take note, the file can change at any point in time so it is recommended to view the file from the online location.*

Troubleshooting

If you are receiving error message popups or having any other issues, our Technical Support team may ask that you enter the Troubleshooting tab.

Show CounterSketch Log: If you are working with our Technical Support team to solve an issue, you may be asked to select this button and possibly send this information to us. Also access this tab without needing to enter Preferences, through CounterSketch Menu > Help > Troubleshooting (Be sure to check out the other invaluable resources available to you under the Help tab. See the Help & Resources section for more information).

Launch Troubleshooter: If any areas on the left within the menu appear in red when launched, it can give our support team valuable clues to the cause of your issues. From within this menu, there exist further options that Technical Support may request you to engage if it is necessary. This screen may also launch itself automatically if certain issues are encountered. If this happens, be sure to contact Technical Support.

Where to get Help: If you ever receive an error message, try to pay attention to the sequence of buttons you pushed, the tab you are in, etc. This is valuable information for our programmers when they are trying to solve software issues and 'bugs'. Write this information in the text field and click Submit Debug Report. CounterSketch will send your comment along with important data to help resolve your issue. Notice also that our Support contact information also appears below. Be sure to contact them if you encounter any problems. They're an amazing team and always glad to help!

TRAINING

Gemvision offers multiple training options for CounterSketch Studio and our other products. For CounterSketch, choose from Hands-On or Live Online Training. To view the dates for CounterSketch Studio training, enter the CounterSketch Menu > Help > Training and you will be automatically connected to our website at www.gemvision.com where you can view the class descriptions and class dates and locations.

Hands-On Training

Attend CounterSketch Studio training in person for the most comprehensive exposure to the program. This hands-on approach offers a learning environment with minimal distractions and maximum return. This class is offered at the Stuller's headquarters in Lafayette, Louisiana, or at one of our remote locations.

While attending class at Stuller you will enjoy a factory tour of the facility in which you are taking training and have the opportunity to meet the folks who manufacture the custom creations you design in CounterSketch Studio at Stuller. You have a chance to network with fellow jewelers attending class and share ideas for implementing CounterSketch into your business. This experience is the most effective and memorable way to learn how to use CounterSketch Studio.

Live Online Training

This is an option for people who find leaving the store less practical. This training eliminates the costs associated with travel and still offers an instructor-led experience and the opportunity to ask questions. Online training is ideal for the more tech-savvy who can attend the class prepared with CounterSketch Studio already installed on their computer, ready to tackle any computer issues that may arise.

If you have any questions about classes, contact:

Shelly Ellis
shelly_ellis@gemvision.com
1.800.357.6272 ext. 104

LET US HELP YOU

A tool is useless if you don't know how to use it and Gemvision wants to help you and your staff become CounterSketch Studio Power Users! With every training method we offer, you not only learn how to run the program, but also how make the sales.

SUPPORT

Gemvision Technical Support

Gemvision's expert Technical Support staff is ready, willing and able to answer your toughest questions about the CounterSketch Studio software. The support staff are your biggest ally and are eager to help you solve any problems you encounter.

Contact the Gemvision staff by phone, email or through the use of the LIVE Chat Feature available at the top-right of the interface.

LIVE chat is available M-F 8:30-5:30 Central Standard Time. If you are contracting Gemvision after hours, or if all support personnel are with customers, a support ticket will be generated. You can leave instructions within the software and Gemvision's Tech Support staff will process the request in the order it is received.



For model edit requests, please export your modified model first via the CounterSketch Menu > Export Design and attach it to an email along with your request. (see Import/Export for more information). Otherwise include the Sku or SPI number and we will use the default library version of the model. Whenever possible we will make edits to the file, however some model requests require a new design in which case you can make this request using the Design Feedback (see Design Feedback for more information) for consideration into the next CounterSketch Studio library of digital inventory.



Stuller CAM Services

Experts in jewelry manufacturing, Stuller's elite team of CAM Services representatives are eager to create the design of your (customers) dreams. If you have manufacturing questions, please do not hesitate to contact Stuller CAM Services.

CounterSketch Studio Tech Support

Weekdays 8:30 AM - 5:30 PM CST
Toll Free 1.888.357.6272
Email countersketch@gemvision.com

Stuller CAM Services Support

Weekdays 8:00 AM - 6:00 PM CST
Toll Free 1.800.877.7777
Email camservices@stuller.com

COUNTERSKETCH FORUM

Whether you are looking for tips and tricks, for a refresher on something you missed during training class, or you want to harness the power of the multitude of Marketing Resources, the CounterSketch Forum is your one stop shop for all things CounterSketch. Access all of the tools by clicking the CounterSketch Menu> Help> CounterSketch Forum which will direct you to www.countersketchstudio.com/forum Here you can mingle with Gemvision and Stuller



staff, stay in touch with other users, keep informed of important updates and peruse the latest and greatest resources that Gemvision and Stuller have to offer.

The forum houses on-demand training videos which allow you to move at your own pace as you work independently through the curriculum. Available 24 hours a day 7 days a week, access the forum from the comfort of your own home.

In addition to the training videos, our forum also offers free downloadable Consumer Marketing Program materials give you the tools and resources to help attract business to your store and generate more custom design sales from your existing customer base. Access these at www.gemvisionadvertising.com/css/

OTHER

Design Feedback

To make suggestions for consideration when developing the CounterSketch library, use the Design Feedback feature.

This menu can be accessed through the CounterSketch Menu> Help> Design Feedback button to open the Feedback menu.

Answer the questions and add comments within this menu to provide valuable feedback on the designs for Gemvision. The feedback you provide us on these models is used to better understand the amount of control and design flexibility our user's desire for a specific piece. Once complete, click the Submit button to send the feedback to Gemvision. In the event you change your mind, simply select the Cancel button.

Thank You for your Feedback! We appreciate the time you took to help us make CounterSketch the best ever!



Release Notes

Keep up to speed on exactly what Gemvision's dedicated programming staff has been up to by reading the Release Notes. This helpful documentation gives you access to all of the changes that occur when new upgrades and software patches are released.

About CounterSketch Studio

Ever wonder exactly what version you are using? Well maybe not!, However if you reach out to Gemvision's Technical support Department, they may need to know this information to help resolve an issue or determine how to best help you. If they ask, simply access this information by entering into the CounterSketch Menu and selecting About CounterSketch Studio.

Gemvision Technical Support ▪ 888-357-6272 ▪ countersketch@gemvision.com
Stuller CAM Services ▪ 800-877-7777 x3804 ▪ camservices@stuller.com
Online Resources ▪ www.countersketchstudio.com/forum
Training ▪ www.gemvision.com/training

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